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ABSTRACT

The report presents the findings, analysis, and conclusions of the external evaluation of the effectiveness of Alberta Education Library Services conducted between September 1985 and March 1986 under the guidance of the Library Services Evaluation Steering Committee (Phase 2 of the evaluation and planning process initiated in 1985 to clarify the future role and direction of library services). Background and methodology for the study are discussed; current practices and trends in special libraries are outlined; study findings derived from the library services questionnaires, user interviews, and examinations of library operations are presented; a model for special libraries is offered; the current program is evaluated; and the needs for and benefits of specific new services are assessed. Six guidelines concerning mission, policy development, program and delivery standards, planning and evaluation cycle, departmental integration, and program delivery options are presented for Phase 3 of the evaluation and planning process. Supporting data, primarily statistical, are presented in 27 tables, and 29 references are listed following the body of the report. Three appendices contain the survey instrument, survey analysis, and external library interviews. (KM)

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# An Evaluation of Alberta Education's Library Services

ED274362

Deloitte Haskins & Sells Associates

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IR051453

Alberta Education

Alberta
EDUCATION

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# AN EVALUATION OF

# ALBERTA EDUCATION'S LIBRARY SERVICES

Deloitte
Haskins+Sells Associates

Under Contract to Alberta Education

Edmonton, Alberta

April 1986

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Chairman: Dr. Nelly McEwen, Planning Services
Members: Martin Adamson, Media and Technology
Blanche Friderichsen, Edmonton Regional Office
Dave Laing, Computer Systems and Data Base Management
Dr. John Myroon, Learning Resources Distributing Centre
Gerry Wilson, Calgary Regional Office
Shirley Wolodko, Financial and Administrative Services

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Finally, we would like to acknowledge the contribution of Alberta Education officials, managers, professionals and library staff members who participated in the survey and interviews.

## ABSTRACT

The purpose of this study was to identify the issues, problems, opportunities and priorities which should be considered in developing a long-range library services plan for the department.

The methodology consisted of: a survey of all professional and managerial staff (n = 429); interviews with five senior department officials, 12 library staff members, and a sample (n = 48) of departmental managers and professionals; on-site observations of library operations; a review of library financial information and operating statistics; a review of the literature on special library practices and trends; and interviews with librarians from four external education libraries and three exemplary special libraries. The analysis of findings in each area focused on answering key questions about the library services **program**, its **delivery** and potential **new services.**

The results indicated that staff use the libraries relatively frequently for job-related information, filling both **research** and **professional development** requirements. Users of the central library were generally more satisfied than users of decentralized libraries where components were more inconsistently implemented. Organizational objectives for efficient utilization of resources were not being fully optimized, and a number of problems were identified with regard to the organization and delivery of library services. A variety of gaps and new service areas were also identified.

The cause of weakness in the library services program was considered to be largely **structural** in nature, relating mainly to the absence of a formal mandate and policy framework for implementing library services. Six major recommendations were made with respect to: the development of a **mission** for library services; certain areas requiring **policy development**; the development of **program and delivery standards** and appropriate **monitoring systems**; the establishment of a **planning and evaluation cycle** for library services; the need for enhanced **departmental integration** regarding information services; and the **program delivery options** to consider in developing the long-range plan for library services.

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## I. INTRODUCTION

Alberta Education delivers a range of library services to its professional and managerial staff and to other non-departmental personnel through a network of libraries, consisting of the central library in the Devonian Building (Edmonton), and smaller decentralized libraries in each of the five regional offices (Calgary, Edmonton, Grande Prairie, Lethbridge and Red Deer) and the two provincially administered schools (Alberta Correspondence School and Alberta School for the Deaf).

In recent years there has been an increasing use of computers to assist in purchasing and cataloguing the department's library resources, and in searching external sources of information as part of an expanding reference service within the department. Recent advances in computer and communications technologies and in library software have opened up new possibilities for the delivery of library services in the department; however, the strategy for library services must strike an acceptable balance between the emerging needs of the users, and the costs of providing the required information services.

In recognition of the complex issues surrounding the delivery of library services, the department initiated an evaluation and planning process intended to clarify the future role and direction of its library services.

### Evaluability Assessment

The first phase in the planning process was to conduct an evaluability assessment of library services whose intention was:

- to determine the extent to which the library services structure was amenable to evaluation; and

- to establish the methodology for conducting subsequent evaluation and planning activities.

# I. INTRODUCTION

**Evaluability Assessment** (continued)

The evaluability assessment report (Rutman, McEwen et al, 1985) described the history behind the development of the departmental libraries, and summarized the mandate for library services as articulated in a number of policy directives and functional relationship statements which authorized the libraries to implement specific services. The report also presented a program model for library services to assist in focusing the evaluation questions. The model, presented in Figure 1, is summarized below.

**Program**

The program is a group of resources and activities and their related outputs administered pursuant to a given set of objectives. In this study, **Library Services** is the program being considered, including the resources and services of the eight departmental libraries and other branch resources.

**Components**

Components are subsets of the program which can be linked to external objectives and goals, and which are suitable targets for evaluation. The library services program components consist of:

- **Collection** - The collection contains information resources which are frequently used in the department. The major part of the collection is located in the central library with smaller parts decentralized to the regional offices, provincial schools (Alberta Correspondence School and the Alberta School for the Deaf) and some branches; the decentralized resources are required to meet the unique needs of staff in these locations.

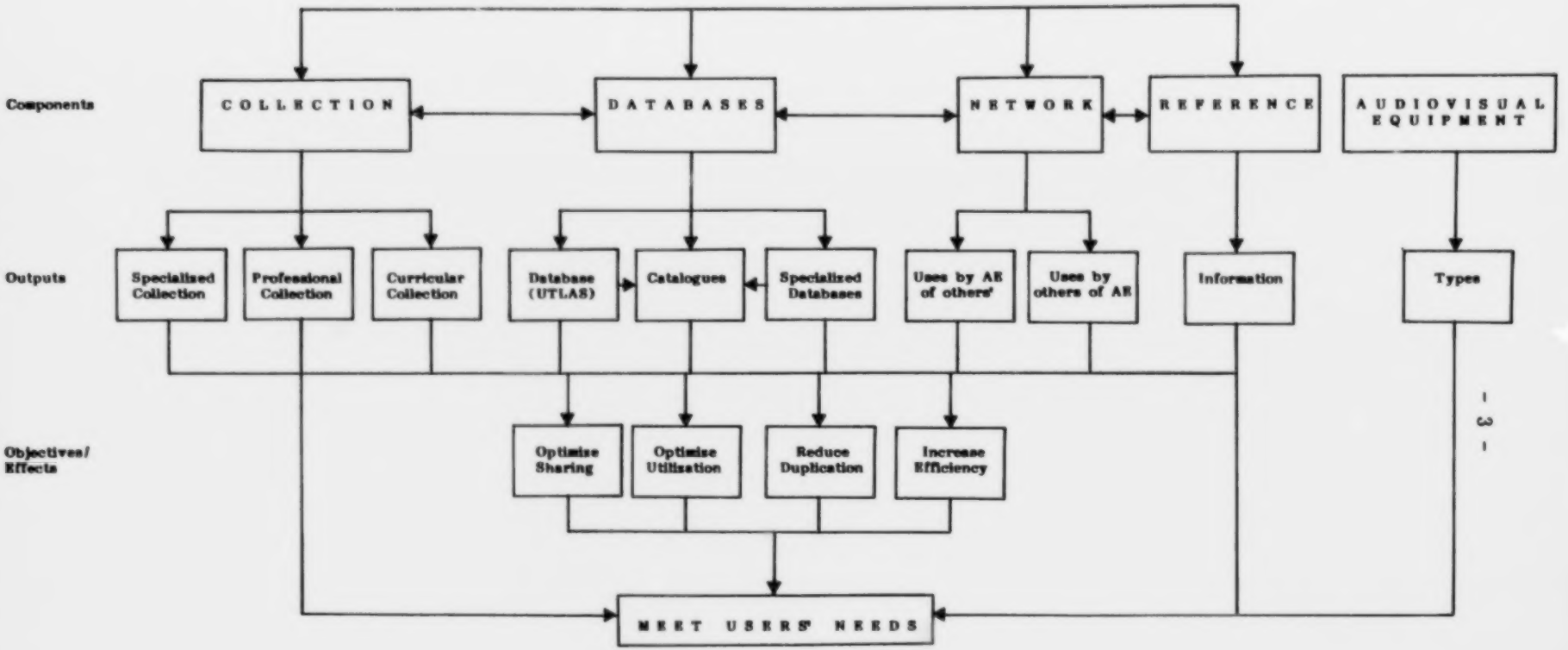


**Figure 1**

**Library Services Model**

**(Rutman, McEwen et al, 1985, p. 7)**

## 1. INTRODUCTION

**Evaluability Assessment** (continued)

- **Databases** - The databases list the information resources and their locations within the department. Manual access to the databases for all regional offices, provincial schools and branches is through the print and comfiche catalogues which are produced on a quarterly basis. The central library accesses the database online through UTLAS or from in-house databases for the most up-to-date information on the department's collection.

- **Network** - The network is the method whereby the department has access to information resources beyond those of its own collection. By participating in a cooperative system, Alberta Education can obtain resources from provincial, national and international members of the system. This provides staff with potential access to information resources from virtually anywhere in the world.

- **Reference** - Specialized library personnel provide reference services to assist departmental staff in locating and retrieving information resources required to meet their unique needs. Through the interactive capability of the network, it is possible to identify the most current information available on a specific topic area in a quick and efficient manner; this reference service frees departmental staff from searching tasks so they can concentrate on interpreting the information.

- **Audiovisual Equipment** - Audiovisual equipment is maintained in the central library for the use of departmental staff in examining audiovisual resources so that they can be evaluated and appropriate ones acquired. This also provides staff with functioning equipment which can be used in making audiovisual presentations.

# I. INTRODUCTION

**Evaluability Assessment** (continued)

**Outputs**

These are the goods and services produced by program personnel and distributed outside the program organization.

**Objectives**

These are purpose statements which indicate what is to be accomplished in terms of impacts and effects, not outputs or work processes.

**Effects**

These are the intended and unintended consequences of a program, including formally stated objectives. For the library services program, the effects include:

- **Organizational Effects** - meeting departmental goals for the efficient and economic utilization of resources;
- **User Effects** - meeting user needs for the quality, quantity and timeliness of information.

Each element of the model was elaborated more fully in the evaluability assessment report, which went on to identify and discuss the major evaluation issues and to establish the framework for subsequent phases of the study:

- **Effectiveness Evaluation (Phase Two)** - An external effectiveness evaluation to determine the manner and extent to which the program achieves its goals and produces effects;

# I. INTRODUCTION

**Evaluability Assessment** (continued)

- **Management Review (Phase Three)** - An internal review of the program, a synthesis of the evaluation and internal review results, and the development of a long-term (3 to 5 years) action plan for library services.

Finally, the report laid down the major options for conducting the effectiveness evaluation, including the specific evaluation questions and sources of information to be used in each of the evaluation areas.

**Study Objectives**

The purpose of the effectiveness evaluation was to identify the issues, problems and opportunities which must be considered in the subsequent development of the long-range plan for library services (Phase Three). The specific objectives of the study are summarized below for each evaluation area.

**Program**

The evaluation determined the effectiveness of library components in supporting the overall information needs of departmental staff in fulfilling their particular roles and responsibilities. The evaluation also determined the extent to which user needs were being satisfied and overall library objectives were being met.

Questions answered in the evaluation of the library program were:

. Who are the users of Alberta Education's libraries?
. What are the uses of the libraries?
. To what extent are users' needs met in the departmental libraries? How does each component contribute to users' needs?
. Which users derive the greatest/least benefit?

## I. INTRODUCTION

**Study Objectives** (continued)

- To what extent are library objectives met? How does each component contribute to achieving the objectives?

**Delivery**

The evaluation determined the efficiency and effectiveness of program delivery, focusing on the distribution of the library materials, the systems and procedures involved in library services delivery, and the organizational structure and staffing of the library operation. This evaluation determined the extent to which library services were delivered in a timely, consistent, coordinated, efficient and cost-effective manner.

Questions answered in the evaluation of library service delivery included:

- How are components implemented in the departmental libraries?
- To what extent is there duplication of holdings?
- How are services implemented in the departmental libraries?
- Are there gaps in service?
- Are services coordinated between the central library and other departmental libraries and branches?
- Are staff referred to other information units when appropriate?
- Is there duplication of services?
- Who is responsible for library services in the departmental libraries?
- Does the central library meet decentralized library needs in a timely way?

**New Services**

The evaluation assessed the opportunities for expansion and improvement in overall library programming and service delivery. This

## I. INTRODUCTION

**Study Objectives** (continued)

assessment focused on the potential benefits of new services and determined the relative priorities of each enhancement from a departmental perspective.

The services considered were:

- Scanning and monitoring publications
- Processing/interpreting information for users
- Reformatting bibliographies to meet specific requests
- Orientation of new staff
- Online access by decentralized libraries to external databases
- Direct electronic communication links between users and the service
- Other services

The information collected in this evaluation will provide input for the subsequent long-range planning process where questions of mandate, mission, policies and technology will be considered.

**Scope of Study**

Since the evaluation results will play a significant role in the long-term strategy for operation of departmental library services, it was considered essential to collect relevant information from both internal and external sources.

**Internal Sources**

Internal sources of information included:

- a comprehensive survey and follow-up interviews with users of library services to identify the expectations, needs and satisfaction level of the service consumers;

# I. INTRODUCTION

**Scope of Study** (continued)

- discussions with senior management regarding their perceptions and expectations of library services;

- interviews with library staff to establish current organizations and operational practices and identify strengths and weaknesses in delivering the required levels/types of service;

- on-site observations of systems, procedures and technologies to document the current operational resources and performance of the library function;

- reviews of policy documents which identify the mandate and objectives for library services;

- reviews of organization charts and position descriptions which outline the authorities, roles and responsibilities of staff and the mechanisms for supervision, delegation and accountability with the organization;

- reviews of available financial and operating statistics to identify the resources used, the outputs delivered and the performance of various library components.

**External Sources**

External sources of information included:

- interviews with external special librarians and library consultants to identify current standards of practice in comparable library settings;

## I. INTRODUCTION

**Scope of Study** (continued)

- a literature review to identify current practices and trends in the special library industry.

In addition to internal and external sources of information, it was also important for the evaluation to encompass both qualitative and quantitative analyses.

The evaluability assessment helped to focus the scope of the evaluation (Phase Two) by identifying a number of issues which would be reserved for consideration in phase three, including:

- the adequacy and distribution of human and physical resources;
- the operational efficiency of library services using operational audit techniques;
- potential cost savings in the delivery of library services, including greater reliance on the library network to provide information;
- the optimal technological configuration.

While the effectiveness evaluation was expected to shed light on such issues, their actual resolution should best be considered as part of the overall long-range planning process where general matters of mandate and policy will be addressed.

**Overview of the Report**

This chapter has provided background to the study and outlined the objectives and scope of the investigation. Chapter II describes the methodology for the study, and the approach used to collect and analyze

# I. INTRODUCTION

## Overview of the Report (continued)

the data, and Chapters III, IV, V and VI summarize the major findings of the study with respect to each area of investigation. Chapter VII presents a model for special libraries, while Chapters VIII, IX and X present the analysis of information and the results of the library services evaluation. The final chapter (XI) presents the overall summary and conclusions of the evaluation, along with guidelines for the program and policy issues to be considered in developing a long-range plan for library services in the department.

## II. METHODOLOGY

This chapter describes the approach followed in collecting information pertinent to the study, and in analyzing and interpreting the information leading to the conclusions regarding the effectiveness of library services in the department. The methodology for the study was prescribed in the evaluability assessment report prepared by the department prior to the evaluation phase. The following sources of information were used in the evaluation:

- **External Sources**
  - . Literature Review
  - . Special Library Interviews

- **Internal Sources**
  - . User Survey (All Staff)
  - . User Interviews (Sample)
  - . Librarian Interviews
  - . On-site Observations
  - . Documentation Review

### Literature Review

As in many other areas of specialized service, the state of the art in library services is evolving at a rapid pace. The review of the literature was conducted to provide an overall context for the assessment of Alberta Education's library services. The literature review helped to identify the range of services typically provided by special libraries and some of the important trends with respect to technology, management, organization and operation of such libraries. The literature search was conducted through the aid of computerized bibliographic database searches, an important recent trend itself in special library reference technique.

## II. METHODOLOGY

### External Special Library Interviews

While the literature search helped to provide background context for the evaluation, a series of interviews with librarians in external special libraries was also conducted to provide an important reference point for comparison between Alberta Education's library services and those of other special libraries. The special libraries interviewed included:

- **Provincial Departments of Education**
  - Saskatchewan Education Library
  - Manitoba Education Library
  - Ontario Ministry of Education Library

- **Exemplary Special Libraries**
  - Home Oil, Calgary
  - Booz-Allen & Hamilton, New York
  - Amoco Research Centre, Chicago

- **University of Alberta**
  - Herbert T. Coutts Education Library

Information for each library was gathered in the following areas:

- Mission
- Services
- Staffing
- Users
- Budget
- Automation

The results of the literature review and of interviews with external special librarians are summarized and presented in Chapter III - Current Practices and Trends in Special Libraries.

## II. METHODOLOGY

### Survey of Professional/Managerial Staff

An important source of information for the study was a detailed survey delivered to all professional and managerial staff in the department. The questionnaire (Appendix A) was based on user surveys developed in other library planning and evaluation studies (Palmour, 1980), and was refined in consultation with the Project Coordinator and the Central Library Manager. The questionnaire was reviewed by the Steering Committee and further refinements were made in preparation for the field test. A group of eight individuals representing each division in the department was selected for the field test, and their comments were used to finalize the survey prior to distribution.

The survey requested information concerning:

- division, branch, and working title of each respondent;
- types and format of information used, and the activities for which the information was required;
- sources of information used;
- detailed assessment of the departmental library resources and services;
- benefits of library utilization, perceived gaps in service, and usefulness of potential new services;
- priority of serving various departmental and external users.

The Project Coordinator was responsible for developing a comprehensive list of the professional and managerial staff in each division and branch. On the basis of the list, the questionnaire was distributed to each of the department's 429 professional, managerial and executive

## II. METHODOLOGY

**Survey of Professional/Managerial Staff** (continued)

staff, with a covering memo from the Deputy Minister outlining the rationale for the survey. The Project Coordinator provided follow-up to expedite returns from each of the Branch Directors, and a cutoff date was established at which time coding, data entry and analysis were started. Prior to analysis, the survey data were submitted to preparation and checking procedures following the approach described in Humphrey (1983). The data were then analyzed using the University of Alberta mainframe and statistical software.

In total, 340 surveys were returned, representing an overall response rate of 79%. Of the 429 surveys distributed, fewer than 10 were returned untouched. Some of these had negative comments regarding the length of the survey or the perceived priority of the project.

All survey results presented in this report are based on the actual number of respondents who answered each question rather than on the total number of respondents. Since all respondents did not answer each question, the number of cases varies from one question to the next. Missing data are excluded so that the percentages are based on the number of cases for any given question.

The survey results were analyzed by function, location and division:

## II. METHODOLOGY

### Survey of Professional/Managerial Staff (continued)

#### Function

Four functional categories were developed:

**Senior Management**
- Deputy Minister
- Assistant Deputy Ministers
- Directors

**Middle Management**
- Assistants
- Associate Directors
- Consultants
- Coordinators
- Managers
- Supervisors
- Principals
- Department Heads

**Professional**
- Administrative Officers
- Analysts
- Learning Resource Officers
- Research Officers
- Test Development Specialists
- Other

**Teachers**
- Teacher Supervisors
- Senior Teachers
- Teachers

The "Other" titles (e.g., Information Officers, Interns, Accountants, Engineers, etc.) were included within the "Professional" category for purposes of analysis. These functional categories were chosen to correspond to the major groupings of staff positions in the department. The working title checked off by survey respondents was used to determine their function.

## II. METHODOLOGY

**Survey of Professional/Managerial Staff** (continued)

**Location/Division**

Three locational and five divisional categories were developed:

**Central Office**

**Deputy Minister's Office**
- Communications
- Legislative Services

**Finance and Administration**
- Financial and Administrative Services
- Personnel Administration
- School Book
- School Buildings
- School Business Administration Services

**Program Delivery**
- Support Programs

**Program Development**
- Curriculum
- Early Childhood Services
- Language Services
- Media and Technology
- Native Education Project
- Secondary Education Implementation Project
- Special Education Services
- Teacher Certification and Development

**Planning and Evaluation**
- Computer Systems and Data Base Management
- Planning Services
- Student Evaluation

**Regional Offices**
- Calgary
- Edmonton
- Grande Prairie
- Lethbridge
- Red Deer

**Provincial Schools**
- Alberta Correspondence School
- Alberta School for the Deaf

## II. METHODOLOGY

### Survey of Professional/Managerial Staff (continued)

The locational categories were chosen to correspond to the site of one of Alberta Education's eight libraries. The divisional categories correspond to the organizational structure of the department at the time the survey was delivered. The regional offices and provincial schools were included as part of the Program Delivery Division for divisional analyses. The branch checked off by each survey respondent was used to determine location and division.

Further analysis of the survey results was possible according to the actual title of the respondent, but it was felt the general survey trends could be determined without jeopardizing the confidentiality of the responses provided.

Table 1 presents the response rates by function and division. The response rate was generally good (i.e., greater than 50%) except for senior management from the Deputy Minister's Office and from the Planning and Evaluation Division. Table 2 presents the response rate by function and location. The response rate was generally good in all categories except for professional staff from the regional offices.

Because the survey was delivered to the entire professional population rather than a sample, and because a high response rate was achieved, it was not considered necessary to test the confidence of the results statistically when analyzing the survey findings. The results of the user survey are summarized in Chapter IV. The detailed results of each survey question are presented in Appendix B.

### User Interviews

A representative sample of professional/managerial staff was interviewed to provide a better understanding of the duties and information requirements of the various positions, branches and

**Table 1**

**Survey Response Rate By Division ***

| Function | Deputy Minister's Office | | | Finance and Administration | | | Planning and Evaluation | | | Program Development | | | Program Delivery | | | Total | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | R | S | % | R | S | % | R | S | % | R | S | % | R | S | % | R | S | % |
| Senior Management | 1 | 3 | 33 | 6 | 6 | 100 | 1 | 4 | 25 | 10 | 10 | 100 | 9 | 10 | 90 | 27 | 33 | 82 |
| Middle Management | 3 | 3 | 100 | 18 | 24 | 75 | 26 | 27 | 96 | 21 | 23 | 91 | 58 | 78 | 74 | 126 | 155 | 81 |
| Professional | 3 | 5 | 60 | 21 | 31 | 68 | 36 | 46 | 78 | 19 | 25 | 76 | 23 | 25 | 92 | 102 | 132 | 77 |
| Teachers | - | - | - | - | - | - | - | - | - | - | - | - | 68 | 109 | 62 | 68 | 109 | 62 |
| TOTAL IDENTIFIED | 7 | 11 | 64 | 45 | 61 | 74 | 63 | 77 | 82 | 50 | 58 | 86 | 158 | 222 | 71 | 323 | 429 | 75 |
| MISSING TITLE/DIVISION | | | | | | | | | | | | | | | | 17 | - | - |
| TOTAL RESPONSES | | | | | | | | | | | | | | | | 340 | 429 | 79 |

* R - Number of Respondents
S - Number of Staff Surveyed
% - Response Rate

**Table 2**

**Survey Response Rate By Location ***

| Function | Central Office | | | Regional Offices | | | Provincial Schools | | | Total | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | R | S | % | R | S | % | R | S | % | R | S | % |
| Senior Management | 19 | 25 | 76 | 5 | 5 | 100 | 2 | 3 | 67 | 26 | 33 | 79 |
| Middle Management | 70 | 80 | 89 | 47 | 66 | 71 | 8 | 9 | 89 | 125 | 155 | 81 |
| Professional | 80 | 111 | 72 | 3 | 4 | 75 | 16 | 17 | 94 | 99 | 132 | 75 |
| Teachers | - | - | - | - | - | - | 68 | 109 | 62 | 68 | 109 | 62 |
| TOTAL IDENTIFIED | 169 | 216 | 78 | 55 | 75 | 73 | 94 | 138 | 68 | 318 | 429 | 74 |
| MISSING TITLE/LOCATION | | | | | | | | | | 22 | - | - |
| TOTAL RESPONSES | | | | | | | | | | 340 | 429 | 79 |

* R - Number of Respondents
S - Number of Staff Surveyed
% - Response Rate

## II. METHODOLOGY

**User Interviews** (continued)

divisions of the department. Table 3 indicates the number of staff interviewed by position and division, and the corresponding sample rates for each position.

A total of 53 staff was interviewed. Because of the importance of senior management's perceptions regarding library services, all Education Officials were interviewed (Deputy Minister, Assistant Deputy Ministers). For other professional staff, a representative sample was chosen. The selection of positions was stratified according to the functional and divisional profile of the department, and actual interviewees were selected on a random basis from the list of departmental staff compiled by the Project Coordinator.

The staff interviews focused on the following information:

- Duties and Responsibilities
- Information Requirements
- Expectations for Library Services
- Library Utilization and Satisfaction

The results of user interviews are summarized in Chapter V.

**Librarian Interviews**

In addition to the sample of departmental professional and managerial staff, employees in each of the department's libraries were interviewed to determine their perceptions of library services. Twelve librarians were interviewed:

- **Central Library** - Library Manager, 4 professional librarians

**Table 3**

**Interviews Conducted With Department Staff**

| Positions | Deputy Minister's Office | Finance and Administration | Planning and Evaluation | Program Development | Program Delivery | Total * | | |
|---|---|---|---|---|---|---|---|---|
| | | | | | | I | A | % |
| **Senior Management** | | | | | | | | |
| Deputy Minister | 1 | - | - | - | - | 1 | 1 | 100 |
| Assistant Deputies | - | 1 | 1 | 1 | 1 | 4 | 4 | 100 |
| Directors | - | 1 | - | 1 | 8 | 10 | 28 | 36 |
| **Middle Management** | | | | | | | | |
| Associate Directors | - | - | - | 2 | - | 2 | 40 | 5 |
| Assistants | - | - | - | - | - | 0 | 7 | 0 |
| Manager/Co-ordinator/ Supervisors | - | - | 1 | 1 | - | 2 | 28 | 7 |
| Consultants | - | - | 2 | - | 5 | 7 | 73 | 10 |
| **Professional** | | | | | | | | |
| Analysts | - | - | 2 | - | - | 2 | 16 | 13 |
| Learning Resource Officers | - | - | - | 2 | - | 2 | 11 | 18 |
| Test Development Specialists | - | - | 3 | - | - | 3 | 16 | 19 |
| Research Officers | - | - | 2 | - | - | 2 | 12 | 17 |
| Administrative Officers | - | 1 | - | 1 | - | 2 | 16 | 13 |
| Other | 1 | 2 | 1 | 1 | 2 | 7 | 68 | 10 |
| **Teachers** | | | | | | | | |
| Teacher Supervisors | - | - | - | - | 1 | 1 | 8 | 13 |
| Senior Teachers | - | - | - | - | 1 | 1 | 12 | 8 |
| Teachers | - | - | - | - | 7 | 7 | 89 | 8 |
| TOTAL INTERVIEWS | 2 | 5 | 12 | 9 | 25 | 53 | 429 | 12 |

* I - Number Interviewed; A - Actual Number of Staff; % - Sampling Rate

## II. METHODOLOGY

**Librarian Interviews** (continued)

- **Regional Offices**
  - Calgary - library technician
  - Edmonton - library technician
  - Grande Prairie - professional librarian
  - Lethbridge - clerk
  - Red Deer - clerk

- **Provincial Schools**
  - Alberta Correspondence School - library technician
  - Alberta School for the Deaf - teacher librarian

The interviews focused on the following information:

- Duties and Responsibilities
- Library Strengths and Weaknesses
- Morale and Job Satisfaction

**On-site Observations**

Brief observations of library operations were made during the interview process. The observations focused on the general organization and layout of each library. A detailed analysis of operating procedures was not performed.

**Documentation Review**

A review of documentation was performed to assist in identifying the historical development of Alberta Education's library services and the present status of the program in terms of resources allocated and outputs delivered. The documentation review included the following information:

## II. METHODOLOGY

**Documentation Review** (continued)

- Mission and Policy Statements
- Budgetary and Financial Information
- Operating Statistics
- Organization Charts and Job Descriptions
- Service Descriptions

The results of the librarian interviews, on-site observations and documentation review are summarized in Chapter VI.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

This chapter is an overview of current library practices and trends, designed to provide background and context for the evaluation of Alberta Education's libraries. More detail on many of these topics can be found in two books which were written with the non-technical reader in mind. These are **Managing Special Libraries** (White, 1984) and **Special Libraries: A Guide for Management** (Ahrensfeld, 1981).

### Introduction

For many years now, experts have been proclaiming that we are entering or living in the age of information (Masuda, 1981; Vallee, 1982). This thought has been triggered by the convergence of three technologies in the 1980s, namely: computers, telecommunications (voice and message) and libraries. In this context, **libraries include the institutional means by which our culture is transmitted from one generation to another.**

Computers will continue to speed up the rate at which information can be processed, stored and retrieved. Telecommunications will continue to increase the speed of information transfer, collapsing both time and space. These two technologies are transforming the methods used for transmission of knowledge and culture, and are, therefore, transforming libraries as well.

Three trends are very clear and very relevant to this study:

- Rapid change has become ingrained in western societies, and organizations must learn to live with it.

- In order to cope with rapid change, organizations must be well informed. This in turn means that decision makers must have access to accurate and timely information. The collapse of time and space also implies that effective decisions can no longer be made solely on local information.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

. Libraries and information services are becoming crucial support organizations for corporations and government agencies.

Emkhe (1984) makes a strong case for intimate involvement between researchers, decision makers and information services with particular reference to multidisciplinary areas such as education. She believes that professionals in a research and planning organization must be closely supported by information services tailored to their own particular needs. This is the primary focus of special librarians. The interrelationship between technological change and libraries is given broad treatment by Lewis (1983). He concludes that information systems will be pervasive by the end of this century if current trends continue. Whether or not information systems will be recognizable as libraries remains an open question, as is the future role of present-day librarians. Lewis concludes, however, that of all the professionals now involved in delivering information services, librarians have the best experience to date, and probably have the best chance for developing suitable solutions to the evolving needs of organizations.

Special libraries, because they are primarily involved in organizing information to support decision making, are in the forefront of this wave of change and invention in information systems.

### Special Libraries: An Overview

Most authors have found it difficult to define a special library. White (1984) concurs with this difficulty; however, the following is offered in an attempt to provide some context with respect to special libraries.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

#### Mission/Goals and Objectives

The six special librarians interviewed essentially agreed on the same mission for their library: to provide library and information services to employees of their organization. The corporate librarians interviewed were very clear that service included a **value added** component, that is, the information delivered must go beyond the mere delivery of books, articles, films, etc. which might contain the information sought. The information must also be packaged and to some extent pre-processed by the library to make the content more easily accessible to the client.

This restricted but ambitious goal of **providing value added library and information services to a select clientele** can be considered the prime directive for special librarians. It is emphasized and repeated often in the literature of the last 30 years (e.g., Ahrensfeld, 1981; White, 1984).

#### Size and Locations

Special libraries are usually small in size. Such libraries are normally housed in a single space, have small collections which represent only essential materials, and are usually staffed by two to ten individuals. Where the overall information services operation has more staff, those associated primarily with library functions will usually not exceed this range.

Very large, geographically dispersed organizations tend to have small, largely independent libraries in each region. Each library will have a mandate to serve those employees that are geographically proximate. Some large organizations also have a central library to

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

provide corporate wide and backup services. Centralized services are generally limited to personnel issues (organization, job descriptions, inservice, etc.), to user training and to resource sharing via collection development, reference and interlibrary loan (ILL). The central operation often provides a cataloguing service, although acquisitions are typically decentralized, with the union catalogue produced through central services used to support the internal network. This pattern is more common in government libraries where acquisitions are usually coordinated by the branch library at the local level.

The issue of centralization/decentralization is not treated to any extent in the special library literature. Two recent articles explore the pros and cons of resource sharing through networks. Neerland (1984) explores the impact of various organizational solutions on service. He concludes that an ideal approach is a decentralized organizational structure with centralized support that makes the system transparent to the user. Stevens (1985) takes a satirical look at the consequences of relying too heavily on other libraries' resources to provide local services. He also argues for a decentralized approach where local resources take care of local needs. Reynolds (1985) discusses this issue with respect to computerized searching; the discussion leans towards a centralized solution (p. 558).

### Clients of Special Libraries

The clients of special libraries are usually restricted to employees of the organization. The librarians' attention will be largely focused on those employees that need information from beyond the internal files of the organization. Users tend to fall into two groups:

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Special Libraries: An Overview** (continued)

- Researchers, planners, product development engineers, persons doing contract research for outside clients, etc., who clearly need information for their assigned job tasks.

- Senior executives who require continuous information on the local, regional, national and international environments of their organization.

Services are sometimes made available to other groups engaged in activities related to those of the organization. The three provincial education libraries surveyed indicated that they provide walk-in service to members of the public; however, each noted that such service had a very low priority and no effort was made to encourage such service. This limited service/open access policy is typical of publicly funded special libraries, but very rare in corporate special libraries (Ahrensfeld, 1981; White, 1984).

**Management**

Most special libraries are managed by professionals, although some operate solely with clerical staff. The majority of professionals are trained in library and information science, with the remainder recruited from the ranks of the research professions (e.g., chemists, physicists, etc.) (Ahrensfeld, 1981; White, 1984; Mount, 1984). Librarians are usually responsible for all aspects of the library operation, from reference service, to budgeting and staff supervision.

The position of the library in the organizational hierarchy has long been a contentious issue with special librarians. Many are delegated to minor administrative branches of the organization.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

Such libraries tend to be understaffed, underfunded and under-utilized. Libraries acknowledged as successful by their organization tend to have a much higher profile. The library manager usually reports directly to a senior manager, often at the same level as the manager of corporate data processing (which almost invariably has a high profile). Two of the librarians interviewed, Home Oil and Amoco, enjoy close and harmonious relations with the data processing group to develop and deliver information services within the organization.

In the Manitoba Department of Education, the Director of Information Resources, a qualified professional librarian, reports to the Deputy Minister. In contrast, the Saskatchewan Education library reports much lower in the organization; perhaps not coincidently, it is a much smaller and relatively underfunded operation, even though its mandate is very similar.

### Staffing

White (1984) asserts that the minimum staffing level for a special library is one professional librarian and one clerical support staff. He also suggests that this ratio be maintained as staff are added unless the library tasks demand more or less clerical labour due to local circumstances. For example, involvement in records management, microfilming or technical services for other libraries would demand more clerical input. On the other hand, if most aspects of the operation are automated, the ratio of professionals to clericals might increase, provided the total professional staff was greater than two. White also details the adverse consequences of relying too much on clerical personnel for information services (pp. 127-129; see also Russell, 1984).

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

#### Budgets

Budgets among special libraries vary enormously; moreover, for most corporate special libraries, budget information is strategically important and therefore not readily disclosed. For the most part, however, special library budgets follow discernible patterns.

The largest cost component is usually salaries, followed by expenditures for materials, followed by expenditures for outside services such as computer searching. A 1978 study of U.S. federal libraries indicated that of a total operating budget of $191.8 million, $121.9 million (64%) went for salaries. The overall ratio of professionals to support staff was 3:8 (Quirk, 1981). These statistics are somewhat misleading because of the influence of large special libraries which tend to have proportionately more staff than small libraries.

Materials accounted for $38.7 million (20%) and other expenses accounted for the balance. Within materials, serials accounted for 47% of expenditures, monographs 43%, audiovisual 2%, microforms 4%, and binding periodicals the remaining 4% (Quirk, 1981).

Other services accounted for the remaining $31.2 million (16%) of expenditures on federal libraries in 1978 (Quirk, 1981). This proportion has probably shifted upwards since 1978 as special libraries embrace online searching and microcomputer-based automation. For example, the Booz-Allen & Hamilton library spends hundreds of thousands of dollars for online searching, but subscribes to only a few hundred journals.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

For the education libraries studied here, the general expenditure pattern pertains, provided one considers exceptional services such as film booking or providing cataloguing services for other libraries.

#### Automation

Special libraries have tended to be at the leading edge of library automation. In part this reflects the fact that many of their organizations are, and have always been, at the leading edge of business computer use (Reynolds, 1985, p. 89). Special libraries usually operate in a "time is money" environment, and nearly always perceive themselves to be short staffed in terms of the potential need for service, leading special libraries to exploit each new generation of computers and software at an early stage in its introduction. Adding to this the acute awareness that information handling, dissemination and retrieval mechanisms will be almost entirely computerized in the foreseeable future, it is not surprising that special librarians are in the forefront of library automation.

This desire to get the most out of technology has led to the development of a large number of idiosyncratic systems. It is only in recent times that there has been any attempt to standardize computer products used by special libraries. This drive towards standardization has come from vendors attempting to exploit and monopolize a market rather than from special librarians. Nevertheless, the solutions chosen by any one special library remain much more site specific than one would find in a sample of public or academic libraries, ranging from fully integrated mainframe library management systems, to completely piecemeal hardware and software

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Special Libraries: An Overview (continued)

systems purchased over several years with a view to eventual integration through networking. Most special libraries fall somewhere in between.

The use of bibliographic service bureaux is not common amongst special libraries. For small special libraries, the cataloguing work load is usually too low to justify the overhead of using a bibliographic service to create cataloguing records when compared to in-house or microcomputer alternatives. Use of such bibliographic services is most common in circumstances where the "hit rate" (i.e., the number of catalogue records found that match the collection) is high. One example is medical libraries, where the U.S. National Library of Medicine contributes large numbers of machine readable records for medical texts. Another example is education libraries, which are able to exploit the records for trade books contributed by the Library of Congress and the National Library of Canada.

### Typical Components and Services

The services provided by special libraries to their clients are quite varied. The components and services described below are what most special librarians would consider typical (Ahrensfeld, 1981).

#### Collections

Special library collections are dominated by serials (journals and magazines), microform collections (to save space/cost), reports, handbooks/databooks/manuals/catalogues from relevant business areas, and secondary source indexes (indexes to serials). Standard trade books do not dominate such collections as they do in other kinds of libraries (Griffin, 1985; Ahrensfeld, 1981; White, 1984).

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Typical Components and Services (continued)

There are some exceptions to this rule, the education libraries studied here being a case in point. Because school textbooks and materials published for schools are the subject of much research and evaluation by the parent ministries, these libraries collect a relatively large number of trade books. This affects the technical processing work load, in particular cataloguing, as well as the collection profile.

There is a growing trend for special libraries to take over the management of non-financial records for the organization, including records management and archival services. This often involves the management of warehouses or extensive microfilming operations.

### Databases

A traditional database possessed by all libraries is the catalogue. The catalogue is an index to the local collection which provides users with access to local materials by author, title and subject. More often than not, catalogues are maintained as a computerized index of some kind. Many libraries generate book catalogues from the computerized indexes, while a smaller number provide online access, and some libraries still use card files.

Perhaps a more significant and increasingly essential database form in special libraries is the online database. There are several commercial organizations in North America which provide literature databases on public access computers on a fee-for-service basis (e.g., DIALOG, ORBIT, BRS, CANOLE, etc.). The actual databases, which now number in the thousands, are created by third parties and made available to the public via service bureaux. By subscribing to, for example, DIALOG or BRS, a library can gain access to several

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Typical Components and Services** (continued)

hundred different databases. There is no obligation to use them all, but at the same time there is no way (and really no need) to subscribe to a limited subset. (Reynolds, 1985, p. 515 et seq.; Olaja, 1985).

Some databases are unique to single vendors, and libraries often subscribe to several services. The databases cover virtually all areas of knowledge. Most are citation databases, many with abstracts online. A growing number of databases are full text, especially newspapers and magazines as well as those in the area of law and legislation. This reflects the growing trend towards electronic publishing together with the decreasing costs of online storage and computing power.

There is also a growing number of numeric or statistical databases which often allow online manipulation and/or downloading of statistics into local software packages. Librarians are beginning to use these databases and the data manipulation packages to provide value added statistical information to clients.

**Reference**

This is the heart of the special library. Services range from the answering of factual questions, through introductory literature searches, to in-depth annotated bibliographies. There is a growing tendency in research-oriented companies for the special library to be the focus for all literature-based research, and for librarians to be seconded on a temporary basis to research groups or task forces.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Typical Components and Services (continued)

The concept of **value added** service is key to the approach taken by special librarians to the reference service. Strictly interpreted, value added service means **delivering information to the client in a way which makes it easier to use.** The amount of summarizing or interpreting involved in making the information easier to use will vary from case to case and from client to client.

A library is a reservoir of relatively raw information. In most libraries, the librarians teach clients how to use the library and then rely on self-service to accommodate most of the user demand. Special libraries are at the other end of the spectrum. These libraries expect to serve their customers in detail, and will attempt to provide the information in the form most suited to the needs of the patron. Implicit is the acknowledgement by special librarians that their clients are engaged to do a job that is important to their organization, and that the client's time should not be wasted sifting through raw information (White, 1984, pp. 8-11, p. 64).

The librarians will choose the means and sources for answering reference questions. Frequent questions will be answered from the local collection, which is acquired for this purpose. Less frequent and/or broader questions will be answered by searching secondary sources (abstract and indexing journals) which may be on-site or off-site. Much of this kind of searching is now accomplished through the computerized databases discussed earlier.

### Interlibrary Loan and Networking

Interlibrary loan (ILL) is an essential service for a special library because of its (usually) limited resources. By using ILL

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Typical Components and Services (continued)

effectively, a special library can give its users access to a much larger collection than the parent organization could afford.

If the collection is optimized to answer only frequent questions, then it follows that most other questions are answered from external sources. Computer searching has exaggerated this trend. Special libraries rely heavily on external libraries (e.g., large public, government and academic libraries) for resources. Most special libraries also maintain close liaison with similar libraries in their region. This is true even for libraries in competing organizations, where non-proprietary information is frequently shared.

Request processing starts with obtaining a location (lending library) for the material. Recently, bibliographic service bureaux have been offering electronic ILL services. Initially established to share machine readable catalogue records, such utilities (e.g., UTLAS, OCLC) now have very large databases which record the current holdings of very large numbers of libraries. Superimposition of an ILL request on a location search is a natural extension of the cataloguing function. This is particularly useful for libraries that already use such utilities for cataloguing, although the justification for a special library must be judged on a case-by-case basis.

ILL delivery is largely achieved by copying because the majority of traffic relates to journal articles. Some libraries are now using telefacsimile transmission facilities to deliver copies of paper-based sources (Reynolds, 1985, p. 537). Electronic mail is increasingly being used for intercompany documents that already exist in computerized form (Home Oil and Amoco). Book and audiovisual materials are delivered by courier or mail. Recently,

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Typical Components and Services (continued)

commercial operations have been set up to provide a substitute for ILL of articles indexed in online databases. Such companies will supply copies of such articles on a 24-hour delivery basis (Weaver, 1984; Piternick, 1985; Stevens, 1985).

Networking is the official and unofficial system that keeps ILL operational. Reciprocal borrowing between libraries is largely informal; however, newer innovations such as regional union catalogues, electronic mail, telefacsimile and use of bibliographic utilities require a more formal organization. This has led to the development of non-profit organizations, particularly in the United States, whose sole purpose is to organize and facilitate resource sharing between libraries using similar technologies.

Some of these are industry-based library networks (e.g., medical libraries), and some are geographically based (e.g., Metropolitan Minneapolis). In Canada, the provincial libraries tend to fill these coordinating roles.

### Selective Dissemination of Information (SDI)

SDI is perhaps one of the more unique services which distinguish a special library from other libraries which a user may encounter. SDI is a highly proactive service whose purpose is to provide the library's clients with information that alerts them to the changing state of knowledge in their area. Traditional services include:

- routing of selected journal issues to particular clients, sometimes done indirectly through dissemination of title page copies to preserve access to the issue in the library;

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Typical Components and Services** (continued)

- circulation of new acquisitions lists to alert users to new materials;
- selected bibliographies in relevant areas; and
- so called "pathfinders" which give users directions for finding information on particular subjects.

An increasingly popular service is SDI via computer searches where the librarian sets up one or more standard computer searches for individual clients, tailored to that person's particular interests. Once fine tuned, these SDI searches are run on a routine basis and the results forwarded to the client for evaluation on a regular schedule. (See: Ahrensfeld, 1981; White, 1984; Copeland, 1984; Gillman, 1984; Closson, 1984).

A variation on this theme is the newspaper clipping service for senior executives to keep them up-to-date on political and societal changes of relevance to their organization. Many special libraries handle this service on behalf of the organization. Some libraries contract this out (e.g. Ontario Education Library), while others use computer databases and may even subscribe to wire services (Home Oil).

**Technical Services**

Less visible, but equally vital, are the activities of the librarians in the management of the library resources. Typical activities include:

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Typical Components and Services** (continued)

- **Collection Maintenance** - Collection maintenance includes the selection, ordering and purchasing of materials (Griffin, 1985). The collection is usually very circumscribed in terms of subject coverage. Normally the materials are very current, and the collection is reviewed on a regular basis to screen out obsolete materials. The acquisition rate is often quite high relative to the total materials stored. The collection is optimized to support urgent/frequent information requests.

- **Circulation Control** - In special libraries, circulation control is most often concerned with limiting access to specialized or sensitive materials or ensuring that material is available on demand, even though it is not necessarily in the library. Generally, circulation is low to very low compared to other libraries.

- **Technical Processing** - This is the set of procedures needed to add materials to the local collection. Much of it is clerical, such as typing and applying spine labels, binding reports, shelving, etc. An extremely valuable, but largely invisible component, is the effort which goes into choosing the appropriate spine label (to support patron browsing) and choosing the correct author and title entries and subject headings/thesaurus words for the catalogue.

- **Newsletters** - Special libraries nearly always have a newsletter, even if only to promote their own services within the company. Quite often, the library will publish the internal newsletter for the organization.

# III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

## Recent Developments in Special Libraries

Recent trends in special library practices include:

### Management and Goal-Directed Operating Statistics

Special libraries have traditionally been more sensitive to the issue of statistics than other libraries; however, the statistics kept have generally been focused on counting easily identified events (e.g., ILL requests, SDI profiles, etc.). These statistics were generally not connected to pre-set productivity targets, making it difficult for management to control productivity in a special library. The special libraries surveyed in this study are still largely operating in this mode.

In the early 1980s, public libraries began to study ways of assessing library productivity in a more meaningful way. These studies emphasized the collection of statistics which measured the success of the library in providing services. Also stressed was the use of statistical measures as a means for assessing progress towards pre-set productivity goals.

These statistical measures and measurement techniques have now been used and adapted for special libraries (McClure, 1984; Manthey, 1985). The transfer was successful, and one can expect to see more productivity oriented goal setting and more use of dynamic measures of service level in special libraries in the future.

### Records Management

In response to shifts in both the technology and culture of information systems and corporate data processing, special librarians have been developing systems for the automation of

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Recent Developments in Special Libraries (continued)

corporate records. In some cases this has been done by annexing traditional, paper-based office systems to the library. In others, the systems have been cooperatively developed with data processing.

What has made this development possible is the skill librarians have for organizing material so that the database can provide answers to unanticipated queries. This is a critical advantage when one examines the content of data processing courses, most of which concentrate on the design of efficient data structures to provide answers to anticipated queries. It was only in the late 1970s that a concern for unanticipated queries appears in the data processing literature. The antecedents in library literature go back to the encyclopedists of the 18th and 19th centuries. For special libraries, the use of so-called advanced techniques like inverted indexes, keywords, stemming algorithms and Boolean algebra can be traced back to the first generation of commercial computers, representing a 20-to-25 year lead on their bretheren in data processing.

In some organizations (e.g., Amoco Research Center and Home Oil), there has been a harmonious blend of skills, with the librarians contributing logical design skills and expertise on retrieval system use, and the data processing department contributing expertise on program design, data structures and hardware.

### Information Services Consulting

This is a phenomenon which is still evolving out of the automation of special libraries and the movement to automate records management functions where librarians have become increasingly involved in corporate data processing development. Some librarians have

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Recent Developments in Special Libraries (continued)

established their credibility by contributing skills to records management functions at the corporate level. In this case, there is often follow-up work to be done at the request of data processing or client departments to aid in designing new information systems or extending existing systems. The Home Oil library is a good example of this.

A second service is that of educating users in the intricacies of online searching of machine readable databases. Special libraries often provide training for subject specialists that are hired to do literature-related research (e.g., Amoco Research Center) or train users in order to externalize the work of the library. This latter trend is particularly pronounced in academic libraries.

A third service emerges from the enthusiastic way in which special librarians have embraced microcomputers and commercial microcomputer software. As a result, the librarian is often one of the first microcomputer users in an organization, and often the most well versed in the technology. The library often becomes an unofficial source of expertise in microcomputing.

### Participative Research

This is essentially the secondment of librarians to research projects, task forces, committees, etc. to provide information services directly to the end users. Such services include literature searching, report and bibliography organization, editing and production. The seconded librarians act as full members of the team as well as intermediaries between the team and the library. All of the external librarians interviewed for this study did this to some extent, and saw it as a natural and valuable extension of their services.

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Recent Developments in Special Libraries (continued)

#### Executive Information Services

A few libraries have always provided executive services. It is in essence the same as the SDI service offered to researchers, but the client group is senior management where the emphasis shifts to very fast updates of information, daily or more frequently, and where the information is social, political and economic rather than trade or subject oriented.

More and more libraries see this as a natural extension of their other information services. Some, like the Ontario Education Library, recruit personnel with writing and editing skills to help with this function, providing summaries to the newspaper clippings included in the SDI bulletins. Others, like Home Oil, use librarian skills to select and package the information, but leave interpretation to the end user.

With more and more newspapers, news services, stock reports, trade reports, newsletters, etc. available via computer, it seems only reasonable that the library would become the source of the skills necessary to exploit them to serve the strategic information needs of senior management.

#### Downloading of Computer Search Results

Downloading is another service that arises from the use of computer searches (Reynolds, 1985, p. 516), where a microcomputer used as a terminal for searching online databases can capture the search to a file on the micro. Once the search is complete, this local file can be manipulated to eliminate duplicates, to reformat the text, add

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

### Recent Developments in Special Libraries (continued)

captions, bold printing, etc. This is now common and there are software packages available that are specially designed for such applications.

A natural extension is to save the search results in a machine searchable file so that the library gradually builds up a local database of citations for reuse. Such reuse is of course free, in that one does not have to pay online connect time charges. Again, there are commercial packages designed to support this activity.

#### Electronic Mail and Facsimile

During the last three to four years, a number of experiments have been conducted by libraries in the use of electronic mail and/or facsimile transmission to speed interlibrary loan (ILL). In the case of electronic mail, comparisons have been made between mail, Telex/TWX, private networks and public networks (Piternick, 1985; Weaver, 1984). In most studies, the conclusion is that electronic mail is far superior to both mail and Telex and is also less expensive. Since the introduction of Envoy 100 services in Canada, the ILL traffic at the National Library of Canada has swung quite dramatically away from Telex. As in the telephone or telex network, electronic mail only pays off if there are enough people in the network.

This consideration is even more critical for facsimile, where the entrance price is still quite high. Other impediments to more extensive use of such machines include: conflicting standards between various generations of machine; the relative difficulty of unattended operation; and the relatively slow speed of transmission. These points will be largely eliminated by the next generation of

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Recent Developments in Special Libraries** (continued)

facsimile machines. Facsimile is currently economic for time sensitive documents or projects (Reynolds, 1985, p. 537). In the context of special libraries, its use is mostly confined to communication between sites within the same organization.

**CD-ROM Publishing**

CD-ROM stands for Compressed Digital - Read Only Memory. It is a form of digital memory derived from digital laser audio disk players, although CD-ROM disks can encode digital data that can be used by computers (Videodisk, 1985).

The storage capacity of these disks is very large, on the order of 500 MB (million bytes). Disks are available for the IBM PC and the cost is around $1,000 U.S. To date, there have only been a few publications in this format (e.g., the Grolier Encyclopedia which literally allows a subject search of the entire encyclopedia on a micro). One such database is BiblioFile, which supplies 2.2 million machine readable catalogue records (MARC records) on two disks together with searching and card production software. This is just the first generation, (Rosenthal, 1986). There are other firms entering this market, many of them publishers of online databases (e.g., Chemical Abstracts). Brodart has created a CD-ROM online catalogue that runs with an IBM PC, has very sophisticated search facilities and is cheaper than a microfiche reader/catalogue for large libraries.

Clearly this technology is going to affect the operations of special libraries. Online databases will be brought in-house; serials will be available in full text on CD-ROM at a price which will be very small compared to paper journals; difficult to maintain collections

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Recent Developments in Special Libraries** (continued)

like Statistics Canada statistics or standards will appear in CD-ROM. It should therefore be possible to raise the proportion of material sought that is found immediately in the library.

No doubt some users will want their own CD-ROM players, just as some users like to do online searches, but it will likely be "business as usual" for the special librarian, that is, the previously difficult will be made easier, and users will merely increase their expectations with respect to services that were next to impossible before.

**Synopsis**

The above information reflects the general findings with regard to the special library industry as identified in the literature and from interviews with librarians selected for comparative purposes in this investigation. The interviews with special librarians are documented in Appendix C, and the findings are summarized in Table 4.

- **Collections** - Special libraries, while not having large collections, focus on developing strong reference and professional collections. Specialized collections, of which a curricular collection is an example, are also well developed and focused on the unique needs of the organization.

- **Databases** - All of the exemplary special libraries have online catalogues, whereas only one of the education libraries does. The exemplary special libraries have access to extensive databases, while only bibliographic databases are prominent in the education libraries.

**Table 4**

**Comparison Of External Special Library Components/Services**

| Component/Service | Provincial Education Libraries * | U of Alberta Education Library | Exemplary Special Libraries ** |
|---|---|---|---|
| **Collections** | | | |
| Reference | Strong | Strong | Strong |
| Specialized | Strong | Strong | Strong |
| Curricular | Strong | Strong | N/A |
| Professional | Strong | Strong | Strong |
| **Databases** | | | |
| Online Catalogue | Limited | None | Extensive |
| Bibliographic | Extensive | Moderate | Extensive |
| Numeric | Limited | Limited | Extensive |
| Full Text | Moderate | Limited | Extensive |
| **Network/ILL** | High | High | High |
| **Reference** | | | |
| Quick | Strong | Strong | Strong |
| In-depth | Strong | Minimal | Strong |
| Research | Minimal | None | Strong |
| **Current Awareness** | Moderate | Limited | Extensive |
| **Technical Services** | | | |
| Acquisitions | Strong | None | Strong |
| Cataloguing | Strong | None | Strong |
| Circulation | Limited | Extensive | Limited |
| **Marketing** | Moderate | None | Extensive |
| **Inservice** | Limited | Extensive | Moderate |
| **Special Services** | None | None | High |
| **Automation** | Low - High | Low | High |

* Saskatchewan, Manitoba, Ontario
** Amoco, Booz-Allen & Hamilton, Home Oil

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Synopsis** (continued)

- **Network/ILL** - All external special libraries make extensive use of ILL and the collections of other libraries to supplement their generally more circumscribed collections.

- **Reference** - The special libraries are generally able to provide a strong quick and in-depth reference service. The University of Alberta education library is geared towards greater self-help, and does not provide an extensive in-depth reference service except to faculty. Only the exemplary special libraries are engaged to any significant extent in direct research, where librarians are seconded to projects or research teams.

- **Current Awareness** - The current awareness service encompasses a number of activities centered around proactive information dissemination, including:

  . Selective Dissemination of Information (SDI)
  . Routing (e.g. journals, tables of contents, acquisitions lists, etc.)
  . Pathfinders and Bibliographies
  . Clipping Service

  The exemplary special libraries provide extensive and highly tailored current awareness services. The education libraries tend to provide a somewhat narrower range and scope of such services, while the University of Alberta's education library, due to its research focus, provides limited current awareness services.

- **Technical Services** - With regard to the relationship between the central library and other office/branch libraries, the

## III. CURRENT PRACTICES AND TRENDS IN SPECIAL LIBRARIES

**Synopsis** (continued)

government libraries tend towards centralized acquisitions and cataloguing (handled by the University of Alberta's main library on behalf of the education library), while exemplary libraries tend towards decentralization. Excluding routing of periodicals, only the collection of the University of Alberta education library is circulated extensively, although the other education and exemplary special libraries frequently provide permanent office loan of materials.

- **Marketing** - The education libraries tend to engage in lower service promotion than the exemplary libraries, although certain services (e.g., SDI) often have quite a high profile.

- **Inservice** - The University of Alberta's education library actively encourages user self-service. Some of the exemplary libraries train users in searching and may train other professionals and subject specialists in library techniques. Inservice in education libraries appears to have a low priority and profile.

- **Special Services** - The exemplary libraries in particular are participating actively in such areas as corporate records management and information systems design. The education libraries may assume some responsibility in areas such as audiovisual resources, but are not actively involved in special information services.

- **Automation** - The exemplary special libraries are highly automated, including such functions as online searching, cataloguing, online catalogues, acquisitions, serials control, records management and electronic mail. The education libraries vary in the degree of automation, from very little to quite extensive.

## IV. SURVEY FINDINGS

This chapter summarizes the results of the survey delivered to professional and managerial staff in the department. The complete survey results are presented in Appendix B, with cross tabulations by function and/or location as appropriate. Further interpretation of the survey results is included in Chapters VIII, IX and X where the actual evaluation of library services is presented.

The survey (Appendix A) was organized into three major sections:

- **Information Requirements** - The first three questions of the survey dealt with the types of information used by staff, the nature of the activities for which the information was required, and the general sources used to obtain the information.

- **Assessment of Alberta Education's Libraries** - The majority of the survey, from questions 4 to 17, dealt with Alberta Education's libraries, covering users' awareness, utilization and satisfaction with specific library components and services, and the nature of benefits received.

- **New Service Needs** - The final four questions of the survey (18 - 21), dealt with the users' perceptions of gaps and new service needs, as well as the general priorities of serving various departmental and non-departmental clients.

It was considered important in designing the survey to go beyond the measurement of users' satisfaction with library services, and attempt to document their needs for information and specific library utilization patterns, since previous studies suggest that user satisfaction does not necessarily correspond to the quality of the library service (White, 1985).

## IV. SURVEY FINDINGS

### Information Requirements

Table 5 shows the major types of information used by departmental staff. The need for professional information is evident, although teachers use curricular information more frequently than others. Senior management has less need for curricular information, focusing instead on statistical, legislative and legal information. By location, the general pattern is similar, although it appears the decentralized locations require curricular information more than do centralized staff.

**Table 5**
**Major Types of Information Used**
**By Function and Location ***

| Type of Information | Senior Management % | Middle Management % | Professional % | Teachers % |
|---|---|---|---|---|
| Professional | 88 | 87 | 74 | 76 |
| Curricular | 64 | 65 | 45 | 86 |
| Statistical | 84 | 45 | 44 | 24 |
| Legislative/Legal | 76 | 42 | 28 | 8 |

| Type of Information | Central Office % | Regional Offices % | Provincial Schools % |
|---|---|---|---|
| Professional | 76 | 95 | 78 |
| Curricular | 47 | 80 | 84 |
| Statistical | 52 | 41 | 27 |
| Legislative/Legal | 34 | 46 | 17 |

* Multiple Responses Possible

## IV. SURVEY FINDINGS

**Information Requirements** (continued)

Table 6 shows the major format of information used by professional staff. Managers and professionals are high users of periodicals, books and reports. Senior managers are also high users of media analysis, while teachers use books and periodicals most frequently. Regional office staff are heavier users than others of periodicals, and provincial school staff of books, while central office staff use reports, books and periodicals.

**Table 6**
**Major Information Format Used**
**By Function and Location ***

| Format | Senior Management % | Middle Management % | Professional % | Teachers % |
|---|---|---|---|---|
| Periodicals | 88 | 86 | 69 | 75 |
| Books | 80 | 82 | 76 | 97 |
| Reports | 80 | 80 | 70 | 36 |
| Media Analysis | 80 | 44 | 27 | 10 |

| Format** | Central Office % | Regional Offices % | Provincial Schools % |
|---|---|---|---|
| Periodicals | 76 | 89 | 77 |
| Books | 76 | 84 | 94 |
| Reports | 78 | 75 | 42 |
| Media Analysis | 37 | 54 | 16 |

* Multiple Responses Possible

** Central office staff also use online information (40%), and provincial school staff use the mass media (44%).

## IV. SURVEY FINDINGS

**Information Requirements** (continued)

Table 7 shows the major activities for which information is considered important. Staff consider information important to stay current, to handle their daily work, and to do research and write reports. Some differences exist among staff functions; for example, senior management does not undertake research to the same extent as other professional and managerial staff. A similar pattern exists by location.

**Table 7**
**Activities Requiring Information**
**By Function and Location ***

| Activity | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Stay Current | 4.1 | 4.3 | 4.1 | 4.0 |
| Handle Daily Work | 3.9 | 3.9 | 4.1 | 3.5 |
| Research | 3.2 | 4.1 | 3.8 | 4.2 |
| Prof. Development | 3.4 | 3.8 | 3.9 | 3.9 |
| Prepare Reports | 3.7 | 3.8 | 3.8 | 3.6 |

| Activity | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| Stay Current | 4.2 | 4.2 | 4.1 |
| Handle Daily Work | 4.0 | 3.8 | 3.7 |
| Research | 3.9 | 4.0 | 4.2 |
| Prof. Development | 3.7 | 3.9 | 4.0 |
| Prepare Reports | 3.9 | 3.6 | 3.7 |

* Scale: 3 - Somewhat Important; 4 - Important; 5 - Very Important

## IV. SURVEY FINDINGS

**Information Requirements** (continued)

Table 8 shows the most frequently used sources of information. Staff appear to use information "at hand" quite frequently (i.e., personal contacts, branch books, own books, self-generated information). Use of

**Table 8**
**Frequently Used Sources of Information**
**By Function and Location ***

| Source ** | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Personal Contacts | 3.8 | 3.6 | 3.4 | 3.2 |
| Self-Generated | 3.3 | 3.4 | 3.1 | 2.8 |
| Own Books | 3.2 | 3.3 | 3.2 | 3.7 |
| Conferences/Workshops | 3.3 | 3.1 | 2.7 | 2.9 |
| Branch Books | 3.0 | 3.3 | 3.4 | 3.6 |

| Source | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| Personal Contacts | 3.4 | 3.9 | 3.3 |
| Self-Generated | 3.2 | 3.5 | 2.8 |
| Own Books | 3.1 | 3.5 | 3.6 |
| Conferences/Workshops | 2.8 | 3.5 | 2.9 |
| Branch Books | 3.3 | 3.3 | 3.6 |
| Local Departmental Library*** | 3.1 | 3.6 | 3.9 |

* Scale: 3 - Sometimes; 4 - Often; 5 - Always

** Senior managers also use Grants Administration frequently (3.3). Teachers use their local library (ACS/ASD) most frequently (4.1).

*** Central library, regional office libraries and provincial school libraries. See Appendix B-4 for utilization of other sources of information.

## IV. SURVEY FINDINGS

**Information Requirements** (continued)

formal libraries generally ranks somewhat lower, except for teachers who use the provincial school libraries most frequently for information. By location, it is evident that decentralized staff use their local departmental libraries quite frequently in relation to other information sources, while centralized staff on average use the central library somewhat less frequently than other sources.

The most significant finding with regard to information needs is that staff seem to need information for "keeping current/professional development" as much as for "research/day-to-day work". This is supported by the relatively high use of periodicals which are important sources of professional information. Staff also have a wide variety of sources from which they obtain information, using sources "at hand" more frequently in many cases than formal library collections. Decentralized staff tend to use their local libraries more frequently and more exclusively than central office staff.

**Assessment of Alberta Education's Libraries**

Table 9 shows the users' perceptions of the departmental libraries in comparison to external libraries they currently use. The greatest strength of the departmental library network appears to be its proximity to the users, resulting in better convenience and turnaround than external libraries. Having local library staff also appears to be an advantage with regard to helpfulness in finding and retrieving information.

The only perceived area of weakness in the central library is in the quantity of materials available. Users of the regional office libraries perceive weaknesses in materials, services and staff knowledge. They feel library staff are more helpful and available than

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

in external libraries, although they rate materials, the reference service and knowledge of library staff less favourably.

**Table 9**
**Comparison of Departmental Libraries**
**To External Libraries ***

| Assessment Factor | Departmental Libraries | | | External Libraries |
|---|---|---|---|---|
| | Central | Regional Offices | Provincial Schools | |
| **Location** | | | | |
| Convenience | 4.2 | 3.9 | 4.2 | 3.3 |
| Turnaround Time | 4.0 | 3.9 | 4.2 | 3.5 |
| **Materials/Resources** | | | | |
| Currency | 4.2 | 3.6 | 3.8 | 4.0 |
| Organization | 3.9 | 3.4 | 3.7 | 3.9 |
| Quality | 4.0 | 3.5 | 3.7 | 4.0 |
| Quantity | 3.8 | 3.2 | 3.3 | 4.0 |
| Usefulness | 3.9 | 3.5 | 3.7 | 3.9 |
| **Services** | | | | |
| Retrieval | 4.2 | 3.7 | 3.9 | 3.8 |
| Ordering | 3.9 | 3.5 | 3.9 | 3.5 |
| Reference | 4.0 | 3.5 | 3.6 | 3.9 |
| **Staff** | | | | |
| Availability | 4.4 | 3.9 | 3.7 | 3.8 |
| Helpfulness | 4.5 | 4.0 | 4.2 | 3.9 |
| Knowledge | 4.3 | 3.8 | 4.0 | 4.0 |

* Scale: 3 - Fair; 4 - Good; 5 - Very Good

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

Table 10 shows departmental staff awareness of various library resources and services. Staff awareness of the major library components, particularly books, periodicals and the reference service, appears universal. Central office staff have a generally high awareness level, and regional office staff are notable in their awareness of curricular resources. Provincial school staff have an awareness of the major library components, but appear less aware than others of such items as reports and departmental documents, and of

**Table 10**

**Awareness of Library Resources and Services ***

| Resources/Services | Central Office % | Regional Offices ** % | Provincial Schools % |
|---|---|---|---|
| **Resources** | | | |
| Periodicals | 98 | 90 | 100 |
| Books | 97 | 95 | 100 |
| Reports/Documents | 96 | 91 | 83 |
| AE Documents | 92 | 91 | 74 |
| Selection Aids | 88 | 86 | 87 |
| Authorized Curricula | 88 | 93 | 85 |
| Curriculum Guides | 86 | 92 | 83 |
| Acquisitions List | 90 | 84 | 89 |
| **Services** | | | |
| Reference | 91 | 88 | 97 |
| Information Retrieval | 90 | 78 | 89 |
| Ordering | 89 | 86 | 98 |
| Current Awareness | 79 | 73 | 65 |

* Multiple Responses Possible

** Regional office staff are also aware of Special Education Resources (86%).

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

the current awareness service. Since the online databases available centrally are accessed exclusively by library staff, it is not surprising that user awareness of this component is somewhat lower (60% to 75%, see Appendix B-6).

Table 11 provides a listing of the library resources and services consistently ranked highest by departmental staff in terms of:

**Table 11**
**Usefulness, Priority and Frequency of Use of Departmental Library Resources and Services ***

| Resources/Services | Central Office | | | Regional Offices ** | | | Provincial Schools | | |
|---|---|---|---|---|---|---|---|---|---|
| | U | P | F | U | P | F | U | P | F |
| **Resources** | | | | | | | | | |
| Periodicals | 3.6 | 3.9 | 2.9 | 3.9 | 4.3 | 3.5 | 4.0 | 4.2 | 3.5 |
| Books | 3.5 | 3.9 | 2.6 | 3.9 | 4.0 | 3.2 | 4.2 | 4.5 | 3.5 |
| Reports | 3.3 | 3.8 | 2.5 | 3.7 | 4.1 | 3.0 | 3.3 | 3.8 | 2.4 |
| Auth. Curricula | 2.9 | 3.7 | 2.0 | 4.1 | 4.3 | 3.1 | 3.8 | 4.1 | 2.7 |
| Curriculum Guides | 2.9 | 3.6 | 2.0 | 3.9 | 4.2 | 2.9 | 3.0 | 4.1 | 2.8 |
| AE Documents | 2.9 | 3.6 | 2.1 | 3.5 | 3.8 | 2.7 | 2.5 | 2.9 | 1.9 |
| **Services** | | | | | | | | | |
| Current Awareness | 3.1 | 3.5 | 2.4 | 3.6 | 3.9 | 2.6 | 3.0 | 3.6 | 2.1 |
| Info. Retrieval | 3.5 | 3.9 | 2.4 | 3.6 | 4.0 | 2.5 | 3.5 | 4.1 | 2.5 |
| Ordering | 3.2 | 3.6 | 2.1 | 3.8 | 4.1 | 2.6 | 3.7 | 4.2 | 2.4 |
| Reference | 3.4 | 3.8 | 2.4 | 3.8 | 4.1 | 2.6 | 4.1 | 4.3 | 3.2 |

* U - **Usefulness**: 2 - Low; 3 - Moderate; 4 - High
P - **Priority**: 3 - Moderate; 4 - High
F - **Frequency of Use**: 1 - Never; 2 - Rarely; 3 - Monthly

** Audiovisual equipment is also considered useful (3.5) and a priority (3.9), with Special Education resources also a priority (4.0).

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

- Usefulness (Appendix B-7)
- Priority of Maintaining (Appendix B-8)
- Frequency of Use (Appendix B-9)

In general, staff give higher priority than usefulness ratings, indicating the desire to maintain current library capabilities, even though direct utilization may not be high. In addition, decentralized staff tend to give higher usefulness, priority and frequency of use ratings than do central office staff, indicating a greater overall dependency on their local libraries.

The need for periodicals and books appears generally widespread. Regional office staff have a greater need for authorized curricular resources and guides than do others, while provincial school staff appear to focus more heavily than others on books and on their reference service.

In terms of user satisfaction with specific library resources and services, reference to Appendix B-10 indicates that, on average, users are either "Satisfied" or "Somewhat Satisfied" with their libraries. Table 12 shows the resources and services with which users are most satisfied. The satisfaction ratings were derived by statistically averaging user responses to satisfaction with the **quality** and **timeliness** of resources and services.

Regional office and provincial school staff appear to have lower average satisfaction with their libraries than do users of the central library where satisfaction levels are generally high. Some of the weaker areas in decentralized libraries (Appendix B-10) include orientation/inservice and computer courseware/software. Provincial school staff are also somewhat critical of special education resources, unauthorized classroom materials and the current awareness service.

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

Appendix B-11 presents the user responses regarding benefits from utilization of the department's libraries. Benefits are generally considered moderate, with quicker access to information and access to more comprehensive, relevant and current information cited as the most significant benefits, although teachers also indicate a positive impact on job effectiveness. In general, middle managers and teachers report higher benefits than do senior managers and professional staff.

With regard to users' assessment of the departmental libraries, the survey results indicate the following:

**Table 12**

**Satisfaction With Library Resources and Services ***

| Resources/Services | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| **Resources** | | | |
| Periodicals | 4.1 | 3.9 | 3.8 |
| AE Documents | 4.0 | 4.0 | 3.7 |
| Books | 4.0 | 3.8 | 3.6 |
| Reports | 4.0 | 3.9 | 3.6 |
| Authorized Curricula | 4.0 | 4.0 | 3.9 |
| Curriculum Guides | 4.0 | 4.1 | 3.9 |
| Acquisitions Lists | 4.0 | 3.8 | 3.7 |
| **Services** | | | |
| Reference | 4.1 | 3.7 | 3.8 |
| Information Retrieval | 4.1 | 3.7 | 3.8 |
| Current Awareness | 4.0 | 3.8 | 3.5 |
| Ordering | 4.0 | 3.7 | 3.7 |

* Scale: 3 - Somewhat Satisfied; 4 - Satisfied

## IV. SURVEY FINDINGS

**Assessment of Alberta Education's Libraries** (continued)

- awareness levels of specific resources and services are relatively high, and users are generally aware of the major library components;

- specific usage patterns vary by location, although the need for periodicals, books and the reference service is widespread;

- users of the decentralized libraries in many cases rate the resources and services lower than those available from external libraries and are less satisfied than users of the central library;

- the major benefits of library use relate to quicker access to better information.

**New Service Needs**

Appendix B-12 presents the user responses regarding perceived gaps in library resources and services. The open-ended comments were coded under the following general headings:

- Disorganization of Resources
- Lack of Staff/Inadequately Trained Staff
- Duplication of Resources
- Lack of Services (e.g., tailored services, ordering, summarizing/ screening, etc.)
- Lack of Materials (e.g., senior students, special education, software, curricular, professional, catalogues, acquisition lists, etc.)

## IV. SURVEY FINDINGS

**New Service Needs** (continued)

The major gaps noted by users related to:

- Lack of Materials
- Lack of Staff

Decentralized users are most critical of staffing and materials, while central office staff focus more on materials. Gaps were mentioned twice as frequently by decentralized staff (86 gaps mentioned by 149 respondents from decentralized locations, or **0.58** gaps per respondent, compared to 49 gaps mentioned by 169 central office respondents, or only **0.29** gaps per respondent). These figures would suggest, however, that a significant number of respondents perceive no major gaps in library services.

Appendix B-15 presents the miscellaneous comments made by the survey respondents. The responses to this question were also open-ended, and the comments were coded under the following general headings:

- Satisfaction with library resources and services
- Problems with staffing or turnaround
- Duplication of resources and services
- Deficiencies in various resources or services
- Inappropriate focus or inadequate planning

A range of miscellaneous comments was made. The most frequent specific comment related to the need for more library planning and for focusing library services on the needs of the department. Problems with specific resources and services were also mentioned frequently, although a significant number of comments indicated satisfaction with the current library services program.

Table 13 shows the usefulness of potential new services indicated by departmental staff. In general, users appear to be indicating a desire

## IV. SURVEY FINDINGS

**New Service Needs** (continued)

for more **value added** library services, placing higher priority on regular scanning of publications and screening/summarizing information on behalf of users. Access to the holdings of other libraries, and library orientation for new staff are also considered important. There appears to be lower demand for librarians to interpret information for

**Table 13**
**Usefulness of New Services**
**By Function and Location ***

| Services | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Regular Scanning | 3.6 | 4.0 | 3.9 | 3.8 |
| Screening/Summarizing | 3.4 | 3.7 | 3.3 | 3.6 |
| New Staff Orientation | 3.3 | 3.4 | 3.6 | 3.4 |
| Online Access To: | | | | |
| . External Libraries | 3.3 | 3.3 | 3.7 | 3.7 |
| . Central Library | 2.9 | 3.2 | 3.3 | 3.7 |

| Services | Central Office | Regional Offices ** | Provincial Schools |
|---|---|---|---|
| Regular Scanning | 3.8 | 4.1 | 3.9 |
| Screening/Summarizing | 3.4 | 3.9 | 3.6 |
| New Staff Orientation | 3.6 | 3.2 | 3.5 |
| Online Access To: | | | |
| . External Libraries | 3.4 | 3.4 | 3.8 |
| . Central Library | 3.0 | 3.4 | 3.7 |

* Scale: 2 - Low; 3 - Moderate; 4 - High

** Regional office staff also want direct electronic communication links between users and library services (3.5).

## IV. SURVEY FINDINGS

**New Service Needs** (continued)

users. The professional staff and teachers appear particularly interested in external library holdings, and teachers are also interested on having online access to the central library holdings. Regional office staff are interested in improving the libraries' communication links with their users.

Table 14 shows the library clients considered most important for receiving services from the departmental libraries. Most staff feel that the libraries should serve the department, with regional office staff considered a marginally higher priority for service than central

**Table 14**
**Priority of Serving Library Users**
**By Function and Location ***

| Library User | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Regional Offices | 2.8 | 2.8 | 2.7 | 2.5 |
| Central Office | 2.7 | 2.7 | 2.6 | 2.2 |
| Provincial Schools | 2.2 | 2.3 | 2.5 | 2.9 |
| School Systems | 1.5 | 2.1 | 2.3 | 2.6 |

| Library User | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| Regional Offices | 2.7 | 2.9 | 2.5 |
| Central Office | 2.6 | 2.7 | 2.3 |
| Provincial Schools | 2.4 | 2.1 | 2.9 |
| School Systems | 2.1 | 2.2 | 2.6 |

* Scale: 1 - Low; 2 - Medium; 3 - High

## IV. SURVEY FINDINGS

**New Service Needs** (continued)

office staff. In contrast to other functions, senior managers do not consider school teachers and administrators a high priority, whereas teachers consider serving the school system quite important. Regional office and provincial school staff place the highest priority on service to their own staff.

With regard to users' perceptions of new service priorities, the survey results indicate the following:

- the major gaps relate to lack of materials and inadequate staffing, although many users are satisfied with current resources and services;

- users are indicating a desire for increased value added services such as regular scanning of publications and screening and summarizing of information, as well as access to the holdings of other libraries;

- staff place the highest priority on services to the department, although service to the school system is also considered important.

**Synopsis**

In summary, the major survey findings are:

- Departmental staff need information to keep current in their respective professional areas, as well as to handle research and day-to-day responsibilities. A wide variety of information sources are used, with sources at hand used more frequently than formal library sources.

## IV. SURVEY FINDINGS

**Synopsis** (continued)

- Library usage patterns vary by location, although the professional collection and reference services are universally considered important.

- Satisfaction levels indicate weaknesses in the decentralized libraries, with materials and staffing concerns most prevalent.

- While many users are satisfied with current library resources and services, a relatively high priority was indicated for expansion of value added services such as screening and summarizing retrieved information, and online access to departmental and external library holdings.

## V. USER INTERVIEW FINDINGS

This chapter summarizes the findings of the interviews with departmental library users, including education officials and professional/managerial staff in the central office, regional offices and provincial schools.

### Central Office Staff

Interviews were conducted with a sample of staff from the three centralized divisions, namely, Finance and Administration, Program Development, and Planning and Evaluation.

#### Information Requirements

The Finance and Administration Division tends to deal with information generated internally by the department for purposes of financial management and administration. There is relatively little need for the kinds of external information normally associated with libraries, except for provincial demographic information used in budgeting, and for general professional/managerial topics germane to the careers of professional staff.

A greater demand for external information is evident in the Program Development and Planning and Evaluation Divisions. These needs relate both to keeping current in one's professional sphere of activity (e.g., evaluation techniques, trends in education, program/curriculum/policy development process, etc.), as well as to conducting basic research as part of specific development or evaluation projects. There is also a need to keep abreast of the public issues and trends in the province. Consequently, information from local, provincial, national and international sources is often required to assist professionals in performing their jobs.

## V. USER INTERVIEW FINDINGS

### Central Office Staff (continued)

#### Library Service Utilization and Satisfaction

Utilization of the central library varied somewhat by individual, although many central staff members reported frequent use of library resources and services, particularly journals and the reference service. Some users depend almost exclusively on the central library for information, although most indicated they had other sources as well.

There is a very high degree of satisfaction with the services received, and most feel the service contributes significantly to job efficiency and effectiveness. While some users have complaints about specific resources or services (e.g., library orientation, specialized searches, research assistance, specialized collections, etc.), the general consensus is that library services are satisfactory, and that additional resources need not be allocated to improving the service. In fact, many feel the current capabilities probably exceed the needs of most users.

#### Expectations for Library Services

Users tend to regard the central library as a personalized service to departmental staff which is not available through other external libraries. They expect the library itself to be close and easily accessible, and the staff to be knowledgeable and dedicated to their special needs. Most feel the library focus should be on its reference and current awareness services, and on specialized collections not readily available elsewhere.

There is less consensus on the extent of value added services to be provided, some users wanting retrieval assistance only, while others

## V. USER INTERVIEW FINDINGS

### Central Office Staff (continued)

want fuller participation of librarians in research. The majority of users, however, feel the library should be proactive in meeting and anticipating user needs, but should not engage in significant interpretation of information on behalf of users.

Many users of the central library indicated a need for better library services for decentralized users, although most were undecided as to the degree of decentralization of resources and services that is warranted.

### Regional Office Staff

Interviews were conducted with the director and a consultant from each of the five regional offices.

#### Information Requirements

The recent shift in role of the regional offices towards monitoring and evaluating educational program delivery in the schools has to a large extent been implemented. Whereas in the past a high degree of emphasis on teacher inservice using the curricular collection was evident, emerging requirements seem to be more towards professional areas (e.g., evaluation techniques, trends in educational program delivery, etc.), on departmental program policies, and on the relevant provincial statutes and regulations.

#### Library Service Utilization and Satisfaction

In general, the consultants use the libraries more frequently than directors, and in most cases are satisfied with the services they receive. The directors expressed some concern that some of the

## V. USER INTERVIEW FINDINGS

### Regional Office Staff (continued)

libraries were not well maintained, nor adequately utilized by staff. The microfiche and catalogues were frequently criticized.

#### Expectations for Library Services

Many users feel that the libraries should serve teachers and other outside groups as well as regional office staff. They feel the librarians should be knowledgeable in educational issues, and that the resources of the library should be specialized to support education and professional development needs.

Regional office users tend to be somewhat unaware of the resources and services available from the central library.

While cataloguing and computer database searching are considered legitimate centralized functions, most staff feel the curricular collections, audiovisual equipment and reference service should be available locally. Many also feel a communications link to the central library would help improve the reference service. In general, the regional offices seem to prefer maintaining a decentralized library system, albeit with some improvements to services.

### Provincial School Staff

Interviews were conducted with the directors and a sample of teaching staff from each school.

#### Information Requirements

As self-contained delivery systems, the information needs of the schools are to some extent administrative, although a substantial

## V. USER INTERVIEW FINDINGS

### Provincial School Staff (continued)

amount of subject specialized (i.e., textbook) knowledge is required to develop and deliver courses of study. As with other departmental staff, there is also an ongoing need for professional information (e.g., teaching/administrative techniques and trends, teacher/student evaluation techniques, etc.).

### Library Service Utilization and Satisfaction

Most staff in the schools are frequent users of the libraries. While some weakness was noted in specific collections, the Alberta Correspondence School staff members are generally satisfied with the resources and services provided and feel the library has a positive impact on their productivity and effectiveness. Alberta School for the Deaf staff are less satisfied, particularly with curricular and professional development resources and the availability of librarian help. Many staff use the central library and are satisfied with the resources and services available.

### Expectations for Library Services

Users in the provincial schools tend to expect the school libraries to maintain collections and resources relevant to the school, and that the librarians should be knowledgeable and dedicated to serving the unique needs of the users. They stress proactive reference and current awareness services, although they feel the central library should provide the in-depth database and interpretive reference services, while the school library should concentrate on curriculum resources and related reference activity.

## V. USER INTERVIEW FINDINGS

### Education Officials

Interviews were conducted with the Deputy Minister, and with all four Assistant Deputy Ministers. The five Education Officials were asked to discuss each of the divisions and branches under their jurisdiction regarding their needs for library services.

While individual responses varied somewhat, there was general consensus on the following major issues:

#### Mandate/Role

Officials feel that the departmental libraries should serve Alberta Education staff and should not attempt to serve the provincial education system or others outside the department. They also feel that the librarians should primarily provide access to information, but that limited research/interpretive activities are also appropriate.

#### Services

While the officials feel the library system should be up-to-date technologically, it need not necessarily be a leader in automation. They feel libraries should be "demand driven", and should refrain from implementing services that must be marketed to potential users. Some concern was expressed regarding the need for some of the databases currently being subscribed to by the central libraries. Senior officials recognized the potential of other libraries in meeting the needs of users, and expressed the concern that such sources be accessed to the greatest extent possible.

## V. USER INTERVIEW FINDINGS

### Education Officials (continued)

#### Centralization/Decentralization

Officials feel the decentralized libraries should continue to report to the regional office/provincial school directors in order to provide adequate supervision and responsiveness to local user needs. They feel it is appropriate, however, for purchasing, cataloguing and general filing/indexing policies to be centralized, although the resources themselves should remain on a decentralized basis.

### Synopsis

The results of the user interviews in the central and decentralized locations are summarized in Table 15. It appears there is a wide diversity of information needs in the central office, with pockets of high library use as well as pockets of low use. Users are quite satisfied with the central library, and are in favour of maintaining current capabilities due to the accessibility of the library and the personalized nature of the services provided.

The decentralized locations tend to have more homogeneous populations and information needs. While use of the libraries is high, the satisfaction is somewhat variable, with numerous complaints regarding library staffing and resources. Decentralized users see a need to serve outside users, and generally indicate a desire to maintain the current decentralized approach, with emphasis on curricular resources and on personalized and proactive reference and current awareness services.

In general, Education Officials seemed to be expressing concerns about the scope and sophistication of library services which are justifiable, and that more emphasis on strategic planning is required to provide a proper framework for service delivery.

**Table 15**

**Summary of User Interviews**

| | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| **Information Requirements** | Internal<br>External<br>Professional<br>Research<br>Trends<br>Current (Timely) | Professional<br>Policy<br>Legislation<br>Deemphasis on curriculum | Administrative<br>Subject Knowledge<br>Professional |
| **Library Utilization** | Variable (High/low) | High, notably by consultants | High |
| **Satisfaction** | High<br>Positive impact<br>Maintain service | Adequate but some criticism<br>Improve service | Variable (ACS/ASD) |
| **User Expectations** | Libraries should:<br>. serve the department<br>. be accessible<br>. have knowledgeable staff<br>. be proactive<br>. improve service to decentralized users<br>. focus on:<br>- reference<br>- current awareness<br>- special collections | Libraries should:<br>. serve the entire education system<br>. maintain decentralized delivery approach<br>. improve links to central library | Libraries should:<br>. serve schools<br>. refer in-depth reference and database requests to central library<br>. focus on:<br>- reference<br>- current awareness<br>- curriculum |

# VI. LIBRARY OPERATION FINDINGS

This chapter summarizes the findings regarding the operation of Alberta Education's eight libraries. Information concerning library operations was derived from librarian interviews, on-site observations and a review of documentation.

## Librarian Interviews

All libraries were visited and the librarians interviewed to ensure that an adequate operational perspective was gained. The results are summarized below.

### Staff Profile

All staff in the central library are professional librarians working full time on library duties. While the majority of staff in decentralized libraries are either technicians or professionals, a number of clerical positions are also involved. Staff are rarely dedicated solely to library duties. Furthermore, staff tend to report to the local office supervisor, and do not, therefore, have a significant profile in their respective organizations. The level of reference service provided by staff in the decentralized libraries is related both to the level of library training and the amount of time available for library duties.

### Attitudes and Perceptions

The librarians generally feel the primary role of the library is to serve the information needs of the department, although some see a need to serve external (i.e., non-departmental) users as well.

Many feel the role of the library and the relationship between the central and decentralized libraries is somewhat unclear in the absence of a formal mandate for library services. There was

## VI. LIBRARY OPERATION FINDINGS

**Librarian Interviews** (continued)

consensus amongst all librarians that acquisitions and cataloguing should be centralized. The librarians are also generally in favour of the current decentralized approach regarding other resources and services, although central librarians seem somewhat concerned about the capacity of the decentralized libraries to support in-depth reference services.

Central librarians and many of the decentralized librarians perceive a low level of support from departmental management regarding library services. The decentralized librarians particularly feel a need to spend more of their time on library duties.

All librarians consider the reference service as the most important library component and the greatest strength of the library program. Decentralized librarians feel the microfiche/catalogue system is the greatest weakness outside of staffing concerns, while the central librarians are concerned about the general lack of awareness and support for library services within the department.

**Job Satisfaction and Morale**

Most librarians work independently, although many decentralized librarians feel their immediate supervisors know little about library operations. Central librarians note good career development opportunities and overall strong support and feedback from their supervisor.

Many of the decentralized librarians feel quite isolated and lack training and career development opportunities.

## VI. LIBRARY OPERATION FINDINGS

### On-site Observations

During interviews with library staff, observations were made of the basic resource and service capabilities at each location. These capabilities are summarized in Table 16, which compares and contrasts the functional levels of Alberta Education's libraries. The findings are summarized below.

### Collections

The reference and professional collections in the decentralized libraries are relatively small in comparison to the central library. Specialized collections in the decentralized libraries are larger, but still less extensive than in the central library. The curriculum collection is well developed in all libraries due to departmental policy regarding maintenance of approved curricular resources. Overall maintenance, organization and layout of the collections in the decentralized libraries is generally less consistent than in the central library, particularly in regional offices.

### Databases

The central library has complete catalogue products for its own collection, and has somewhat restricted online access to the union catalogue through UTLAS. A number of in-house databases are also maintained (e.g., departmental publications from 1901 to 1986; legislation; Alberta Education ERIC documents).

The decentralized libraries have no online catalogue or database capabilities, and the current catalogue products in many cases do not reflect the total library collections due to a large number of donated materials which have not been catalogued in the regional offices. The central library has good online database capability,

**Table 16**

**Summary of Departmental Library Findings**

| Component/Service | Central Library | Regional Office Libraries | Provincial School Libraries |
|---|---|---|---|
| **Collections** | | | |
| Reference | Strong | Limited | Limited |
| Specialized | Strong | Moderate | Moderate |
| Curricular | Strong | Strong | Strong |
| Professional | Strong | Moderate | Limited |
| Maintenance | Strong | Inconsistent | Moderate |
| **Databases** | | | |
| Online Catalogues | Moderate | None | None |
| Bibliographic | Extensive | None | None |
| Numeric | Extensive | None | None |
| Full Text | Extensive | None | None |
| In-house Specialized | Moderate | None | None |
| **Network/ILL** | High | Low | Low |
| **Reference** | | | |
| Quick | Strong | Moderate | Moderate |
| In-depth | Strong | Limited | Limited |
| Research | Limited | None | None |
| **Current Awareness** | Moderate | Limited | Limited |
| **Technical Services** | | | |
| Acquisitions | Strong | None | None |
| Cataloguing | Strong | None | None |
| Circulation | Limited | Limited | Limited |
| **Marketing** | Limited | Limited | Limited |
| **Inservice** | Moderate | None | None |
| **Special Services** | None | None | None |
| **Automation** | Moderate | None | None |

## VI. LIBRARY OPERATION FINDINGS

**On-Site Observations** (continued)

although not all databases are used extensively (e.g., full text) because of cost.

**Network/ILL**

In some cases, decentralized library policy prevents materials from being loaned out or photocopied for other libraries. The decentralized libraries do not generally attempt to access materials from external libraries, and some do not use the internal library network to retrieve information. The central library, however, makes extensive use of ILL to retrieve information not contained in the collection.

**Reference**

In the decentralized libraries, the level of quick reference capability is inconsistent, and in-depth reference services are not generally available. The central library is capable of providing a strong reference service. Alberta Education libraries do not actively participate in research through direct allocation of library staff to research projects. The reference service is largely geared towards identification, location and retrieval of information as opposed to summarizing and interpretation.

**Current Awareness**

The decentralized libraries depend largely on the central library for such activities as routing of contents pages, SDI, etc. The central library capability is strong, although the potential of current awareness services is not being fully utilized.

## VI. LIBRARY OPERATION FINDINGS

### On-Site Observations (continued)

#### Technical Services

Except for the Lethbridge Regional Office and the Alberta School for the Deaf, the decentralized libraries have acquisitions and cataloguing performed centrally. The central library is fully self-sufficient in these functions.

#### Circulation

Beyond routing of periodicals, the circulation function is generally not emphasized in the departmental libraries. The curricular collections in the regional offices and provincial schools are sometimes circulated to non-departmental personnel (e.g., teachers), although the extent of such external circulation has not been documented.

#### Marketing

The departmental libraries do not engage in promotion or marketing of services to any significant extent. The central library contributes information to the departmental newsletter and has a brochure outlining its services, but does not have its own newsletter (by departmental policy).

#### Inservice

The departmental libraries do not conduct extensive inservice training. The central library has the capability to perform this function, although the service does not appear to be a high priority with branch directors, despite attempts by the central library to offer such training.

## VI. LIBRARY OPERATION FINDINGS

### On-Site Observations (continued)

#### Special Services

The departmental libraries are not involved in records management or information systems design functions on behalf of the department. There appears to be limited communication between the various information units within the department regarding planning, development and delivery of information services.

#### Automation

The level of automation in the central library is significant, although not all functions have been completely automated (e.g., online catalogue, circulation, information delivery to users). Decentralized libraries have no significant automation.

### Documentation Review

The review of documentation included financial information and service volumes. The results are summarized below for each area of documentation.

#### Financial Information

The actual expenditures for the departmental libraries in the 1984/85 fiscal year are summarized in Table 17. The central library accounts for approximately 53% of the total expenditures for library services and information resources. The libraries themselves account for approximately 2.5% of overall departmental expenditures ($47.5 million - Votes 1, 3).

**Table 17**

**Departmental Expenditures For Library Resources and Services**

**(1984/85)**

| | | | |
|---|---|---|---|
| **Central Library:** | | | |
| Staff | $ 351,931 | | |
| Acquisitions | 50,572 | | |
| Other Expenditures | 231,976 | | |
| | $ 634,479 | $ 634,479 | 53% |
| **Decentralized Libraries:** | | | |
| Staff | $ 162,923 | | |
| Acquisitions * | 145,884 | | |
| | $ 308,807 | 308,807 | 26% |
| **Branch Purchases:** | | | |
| Acquisitions ** | $ 254,119 | 254,119 | 21% |
| **Total Expenditures For Libraries** | | $ 1,197,405 | 100% |

* Excludes $238,767 start-up cost for Alberta Correspondence School Library.

** Purchase of curricular materials primarily for field testing.

## VI. LIBRARY OPERATION FINDINGS

**Documentation Review** (continued)

Staff expenditures include costs of the full-time library staff as well as prorated costs in the decentralized libraries where staff duties are split between library and office/clerical functions.

Acquisitions include the following expenditure types:

- Books
- Newspapers
- Subscriptions
- Audiovisual

Of the $450,575 spent on such items, the departmental libraries account for $196,456 or 44% of the total; consequently, about 56% of such expenditures go into branch resources. Central library acquisition statistics indicate that only about 19% of such acquisitions are centralized, screened for duplication and available for possible inclusion in the department's union catalogue.

Investigation into branch expenditures for acquisitions revealed that most of these expenditures are incurred for curricular resources which are field tested with students in classrooms. A departmental publication outlines the policy, guidelines and procedures for the selection and classification of provincially authorized learning resources (Alberta Education, 1985). Copies of basic resources which are authorized are distributed to all Alberta Education libraries. These costs cannot, therefore, be directly attributed to library services because the purchased materials are primarily for use in schools and are not available to departmental staff. Only resources such as periodicals, which are purchased for professional use have some potential for duplication.

## VI. LIBRARY OPERATION FINDINGS

**Documentation Review** (continued)

Table 18 summarizes the expenditures directly relevant to the departmental libraries. Deducting the branch expenditures for acquisitions from the departmental library services total, $943,286 remain as the 1984/85 expenditure for resources and services available to staff through formal departmental libraries, or only 2% of total departmental expenditures. Two thirds of this amount is spent on the operation of the central library which is dedicated to serving the information needs of the entire department. A relatively small proportion (8%) of central library expenditures goes towards materials, in contrast to the decentralized libraries (47%).

**Service Volumes**

The central library service volume statistics for the fiscal year 1984/1985 are summarized in Table 19. Similar statistics for the work loads in other libraries were not available.

**Table 18**
**Summary of Departmental Library Expenditures**
**(1984/85)**

| Expenditure Category | Departmental Libraries Central $ | % * | Decentralized $ | % * | Total Expenditures $ | % * |
|---|---|---|---|---|---|---|
| Staff | 351,931 | 55 (68) | 162,923 | 53(32) | 514,854 | 55(100) |
| Acquisitions | 50,572 | 8 (26) | 145,884 | 47(74) | 196,456 | 21(100) |
| Other | 231,976 | 37(100) | - | - | 231,976 | 25(100) |
| Total | 634,479 | 100 (67) | 308,807 | 100(33) | 943,286 | 101(100) |

* Bracketed percentages reflect horizontal calculations.

**Table 19**

**Central Library Service Volumes**

**(1984/85)**

| USER | Books Catalogued (1) | Books Purchased (2) | Periodicals Purchased (3) | Articles Photocopied (4) | Quick Reference (5) | In-depth Reference | Interlibrary Loans (6) | SDI Searches (7) |
|---|---|---|---|---|---|---|---|---|
| **Provided To Libraries** | | | | | | | | |
| Central Library | 3,280 | 547 | 742 | 68 | - | - | - | - |
| Alberta Correspondence School | 6,557 | 155 | 214 | 0 | 36 | 51 | 129 | 12 |
| Alberta School for the Deaf | 436 | - | - | 0 | 8 | 13 | 156 | 0 |
| Calgary Regional Office | 1,700 | 214 | 204 | 1,152 | 20 | 39 | 123 | 48 |
| Edmonton Regional Office | 1,067 | 116 | 206 | 2,208 | 48 | 53 | 372 | 36 |
| Grande Prairie Regional Office | 818 | 194 | 144 | 596 | 8 | 11 | 75 | 0 |
| Lethbridge Regional Office | 1,672 | - | - | 0 | 8 | 13 | 6 | 0 |
| Red Deer Regional Office | 1,874 | 106 | 143 | 228 | 16 | 12 | 219 | 24 |
| Library Total | 17,404 | 1,332 | 1,653 | 4,252 | 144 | 192 | 1,080 | 120 |
| **Provided To Divisions** | | | | | | | | |
| Finance and Administration | - | - | - | 408 | 124 | 182 | 834 | 244 |
| Minister/A.D.M. | - | - | - | 1,340 | 444 | 98 | 498 | 48 |
| Planning and Evaluation | - | - | - | 2,148 | 348 | 210 | 1,287 | 174 |
| Program Delivery (8) | - | - | - | 12 | 8 | 22 | 222 | 0 |
| Program Development | - | 503 | 12 | 6,480 | 300 | 143 | 1,296 | 12 |
| Division Total | - | 503 | 12 | 10,388 | 1,224 | 655 | 4,137 | 478 |
| Department Total | 17,404 | 1,835 | 1,665 | 14,640 | 1,368 | 847 | 5,217 | 598 |

(1) Includes purchased and donated books, and retrospective conversions
(2) Excludes donated books
(3) Subscription titles received centrally but paid from respective branch budgets
(4) In response to requests from central library circulation of journal contents pages
(5) Estimated annual volume based on October 85 - December 85 actuals
(6) Estimated annual volume based on October 85 - January 86 actuals
(7) Selective dissemination of information from online database searches (bibliographic, numeric)
(8) Central staff only (excludes regional offices/provincial schools)

## VI. LIBRARY OPERATION FINDINGS

**Documentation Review** (continued)

The central library catalogued 17,404 books, 19% of which went into the central collection. The cataloguing volumes include the large conversion of the new Alberta Correspondence School Library. Of the books catalogued, only 1,835 new books were purchased, indicating that donated books and retrospective conversions represented a significant cataloguing work load.

The central library received 1,665 periodical subscriptions, approximately 45% paid for from its own budget, and the remainder paid for by the decentralized libraries. Very few branch-purchased periodicals are handled by the central library.

Of the 14,640 articles photocopied, central staff requested about 71% of the total, with the Program Development Division by far the heaviest user. The central library's reference and interlibrary loan services are also heavily geared towards central staff, indicating that the decentralized libraries do not generally utilize the central library extensively as a network source, particularly the provincial schools and the Lethbridge Regional Office.

While exact statistics are not available, approximately 90% of quick reference questions are filled using the reference library on site centrally, while the remainder are filled from the University of Alberta via telephone. Most interlibrary loan transactions are in response to in-depth reference requests. Approximately 14% of such requests are filled directly using the central library and decentralized library collections, 56% are filled by the University of Alberta, and the remainder are filled by other government, college or public libraries (out of province).

# VI. LIBRARY OPERATION FINDINGS

## Synopsis

Interviews with librarians indicated that decentralized library staff have less training and spend less time performing library functions than central librarians. Most librarians felt the departmental libraries had a low profile within the department.

Observations of each library indicated a generally lower functional level of the components and services in the centralized libraries, and inconsistencies between libraries in the implementation of services. While decentralized libraries are not self-sufficient, there does not appear to be strong use of the central library to supplement local capabilities.

Documentation revealed that the department spends about 2% of its budget on libraries, with the central library accounting for approximately two thirds of the total. Decentralized libraries focus more heavily on materials and less on staff than does the central library. A significant amount of the central library's technical work load is performed in support of the decentralized libraries, particularly in cataloguing and acquisitions. Proportionately less reference-related service is delivered by the central library on behalf of the decentralized libraries, indicating that the decentralized library staff do not generally utilize the central library extensively as a network source for meeting local needs.

## VII. A MODEL FOR SPECIAL LIBRARIES

Before presenting the detailed evaluation of Alberta Education's library services, it is essential that the **rationale** for a "library services program" be developed in order to provide the context necessary to appreciate the strengths and weaknesses of the department's program.

### Mission

As in other program areas, there are costs and benefits to be considered in implementing library services within an organization. The basic justification for special libraries is predicated on the need to provide employees with information in order for them to perform their jobs more effectively. Although these professionals can (and do) locate much of their own information, certain economies of scale can be achieved by centralizing information resources in a library, and by providing specialists to locate and retrieve the required information in a timely manner, thereby meeting users' needs for information, while at the same time satisfying the organization's goals for efficient utilization of costly human and material resources.

The fundamental issue in implementing a library services program is the trade-off between the **value of information** to the organization (maximized by decentralizing library skills and resources), and the **costs of providing this information** (minimized by centralizing library skills and resources). In some situations, the benefits to users may not outweigh the costs to the organization, and consequently a case cannot be made for implementing an independent special library, fully self-sufficient in staffing, collections and services.

Implementing a special library in any location presumes that the organization and its professionals are more productive and effective than they would otherwise be if left to depend on library services

## VII. A MODEL FOR SPECIAL LIBRARIES

**Mission** (continued)

supplied from an external source. The design of the program, however, must be based on the information needed by users which cannot readily be provided by external information sources. The special library can then rationally develop its resource and service components, target its users, establish its program objectives and develop the information systems needed to monitor the actual delivery of services.

**Program Planning**

Knowledge of the user population is critical to the design of a library services program. Not all staff will necessarily have a need for library services. Special library users typically require non-routine corporate (i.e., internal) information, or information external to the organization. Those relying heavily on routine internal information (e.g., administrative officers), or on information accessed, synthesized and packaged by others (e.g., senior managers), will not be frequent users of library services. Furthermore, users tend to have a wide variety of information sources which they regularly use, and tend to access sources "at hand" (e.g., own books, telephone, files, etc.) more frequently than "remote" sources. In fact, most employees would not be expected to be frequent users of libraries unless their jobs called for a high degree of research or access to other external information.

The broad category of professionals, those who continue to maintain job-related expertise, more frequently access their own personal collection for theory, and local files or office colleagues for routine corporate information. External facts, non-routine internal information, and external theoretical information are frequently provided (i.e., paid for) by the organization, and may be located in

## VII. A MODEL FOR SPECIAL LIBRARIES

**Program Planning** (continued)

the library or in the individual's office, depending on the frequency of use, required turnaround time and the needs of others to share this information. The special library, then, is one of many complementary suppliers of information services within and outside the organization.

**Library Components**

The formal library **collection** is typically developed to serve regular or anticipated queries for information that cannot readily be answered from sources close at hand. The collection (notably periodicals) also forms the base for dissemination of professional information. In addition, special library collections frequently include highly specialized, rare or unique information not readily available through other sources.

Non-routine or highly selective professional information, and in-depth factual research needs are normally satisfied by accessing the library **network** (i.e., the collections of other libraries). More and more frequently, such information is located through electronic **databases**, and can be retrieved through delivery systems such as interlibrary loan, facsimile transmission or electronic mail.

The **union catalogue** is the mechanism by which library materials and resources can be located and shared within and among organizations. Participation in electronic catalogue utilities encompassing the collections of many libraries can greatly enhance the effectiveness of the library network for information retrieval, and can also streamline the internal cataloguing work load by reusing catalogue records already created by others.

## VII. A MODEL FOR SPECIAL LIBRARIES

**Library Components** (continued)

The **reference** function is the heart of special library services, and is influenced by the skills of staff, the quality of reference and special collections, and the overall functioning of the network through catalogues (local, external), databases and the interlibrary loan/retrieval process.

**Service Delivery Alternatives**

A major issue in implementing a special library is the degree of centralization/decentralization in library resources and services. Where user populations are decentralized, and where corporate policy calls for equal **information richness** of its professional staff, some degree of duplication in staff and resources is necessary in order to provide timely access to quality information services. Nonetheless, certain operating practices may be followed which can help to minimize duplication:

- the centralization of purchasing and cataloguing;
- the centralization of highly specialized or costly collections;
- the centralization of specialized reference skills, tools and resources;
- the optimal utilization of computer technologies;
- the development and implementation of collection policies which control the funding, acquisition and maintenance of materials within the organization.

An appropriate role for a central library to perform in a decentralized delivery system, therefore, might include:

## VII. A MODEL FOR SPECIAL LIBRARIES

**Service Delivery Alternatives** (continued)

- being the first "node" in the network for reference requests which cannot be satisfied locally;
- acting as the "gateway" to external sources of information;
- serving as a repository for special, rare or archival collections;
- being the centre for specialized reference activity;
- taking the lead in planning, monitoring, evaluating and setting policy with regard to library service delivery;
- providing input into job descriptions and training of all library staff.

**Evaluation Considerations**

Libraries can be evaluated on the extent to which user needs are met, and the overall efficiency with which resources are allocated.

**Meeting User Needs**

At the basic level, libraries are implemented to serve users' needs for information, and achievement of this goal can be determined by monitoring user satisfaction with the quality, quantity and turnaround of information. Intermittent users of library services will typically key on the reference service and the quality of the collections, databases and interlibrary loan process. They will also be affected by the current awareness service, including routing of periodicals, journal tables of contents, and acquisitions lists.

## VII. A MODEL FOR SPECIAL LIBRARIES

**Evaluation Considerations** (continued)

More frequent users of library services will also key on the quality of the reference service, but will expect a more highly specialized current awareness service which may include the regular search and retrieval of pertinent articles, many of which will come from the collections of other libraries. This SDI service will also be of interest to managers, particularly senior executives, although these individuals will expect more scanning and monitoring of publications and additional summarization of retrieved information.

**Meeting Organizational Objectives**

At another level, libraries are evaluated on the degree to which resources have been efficiently and effectively allocated, as measured largely by the utilization rates of various resources and services. **Efficiency** in library operations can be fostered by planning, but is heavily influenced by automation, particularly in database search, in electronic retrieval and dissemination of information, and in the acquisitions and cataloguing functions.

Overall **utilization** of library resources and services can be enhanced by various orientation/inservice and marketing activities; by regular circulation of periodicals, title pages and acquisition lists; and by promotion of SDI services to individual staff.

The goal of **reduced duplication** of resources is served largely by an integrated acquisitions/cataloguing process which screens prospective purchases for duplication and creates appropriate catalogues so that others may be aware of the resources. Extensive use of the library network also helps to foster **increased sharing** of resources, both within the organization, and with other external libraries cooperating in the exchange of materials from their respective collections.

## VII. A MODEL FOR SPECIAL LIBRARIES

**Evaluation Considerations** (continued)

These issues are highly dependent upon the particular organizational setting in which library services are being delivered. The principles developed in this chapter, however, help to provide the context necessary for the evaluation of Alberta Education's library services presented in the following three chapters.

## VIII. PROGRAM EVALUATION

The evaluability assessment prescribed that the evaluation of the library services **program** focus on providing answers to a number of key questions (see page 6). The answers to each question are provided in the sections which follow.

### Departmental Library Users

Interviews with librarians and professional staff suggested that management positions were lower users of the departmental libraries than professional staff (e.g., administrative officers, interns, learning resource officers, research officers, teachers, etc.). Documentation available from the central library indicated that the Calgary and Edmonton Regional Offices were drawing heavily on central library services, although the Program Development and Planning and Evaluation Divisions had the greatest overall usage.

The user survey provided the best insight into library utilization. An interesting finding was that decentralized staff use their libraries on average more frequently and more exclusively than do central office staff. Decentralized staff, particularly in the regional offices, sometimes use the central library, although central office staff rarely use the decentralized libraries (see Appendix B-5).*

It should be recognized that, because of the much wider diversity of staff in the central office, the average frequency of use of the central library will be skewed downwards by non-users. Table 20 identifies the central office staff groups that indicated significant usage of the central library in relation to other sources of information (Appendix A, survey question #3). The results clearly show large pockets of high central library use.

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* The proximity of the Edmonton Regional Office to the Devonian Building affords a significant opportunity for regional office staff to use the central library. See Appendix B-16 for a brief discussion regarding Edmonton Regional Office staff use of and satisfaction with the central library in comparison to their own library.

## VIII. PROGRAM EVALUATION

**Departmental Library Users** (continued)

Some of these groups are comparable in size to the user populations in some of the smaller regional office locations. As expected, consultants and research and resource officers are relatively heavy users of the central library. It is interesting to note, however, that directors and middle managers are also significant clients of the central library.

The collections and services in each of the decentralized libraries have evolved in response to the needs of relatively homogeneous populations, whereas central library components serve a more diverse set of information needs. Considering the larger user population being served centrally, the total utilization of central library components will be higher than for the smaller libraries. As

**Table 20**

**Prominent Users of Central Library Services**

| Title of Respondent | Frequency of Use * | Number in Group |
|---|---|---|
| **Senior Management** | | |
| Directors | 3.5 | 14 |
| **Middle Management** | | |
| Assistants | 3.2 | 6 |
| Associate Directors | 3.2 | 22 |
| Consultants | 4.3 | 14 |
| Managers/Coordinators | 3.2 | 25 |
| **Professional** | | |
| Research Officers | 4.3 | 10 |
| Resource Officers | 4.0 | 8 |
| Test Developers | 3.1 | 13 |

* Scale: 3 - Sometimes; 4 - Often

## VIII. PROGRAM EVALUATION

**Departmental Library Users** (continued)

independent populations, however, the decentralized users appear quite dependent on their libraries as a source of job-related information, an observation supported by the high priority placed by decentralized staff on maintaining library resources and services (Appendix B-8) at their location. It appears that central office staff have a wider variety of information needs and corresponding sources at their disposal, and depend on the departmental libraries somewhat less on average, although specific pockets of high utilization can be seen.

**Departmental Library Utilization**

Interviews with librarians and professional staff indicate that the reference and the professional collection (books and journals) are the most frequently used components. The detailed frequency of use of various resources and services was most comprehensively documented by the user survey (Appendix B-9), which provided insight into the prominent use areas in each type of library.

The survey results confirm the higher use of the professional collection and the reference service. While each location tends to have its own resource/service utilization profile, there are only a few needs which seem to be somewhat unique, such as:

- books in the provincial schools;
- curricular materials and the ordering service in regional offices and provincial schools;
- Alberta Education documents and audiovisual equipment in regional offices.

These patterns of use are largely as expected for the types of activities at each location.

## VIII. PROGRAM EVALUATION

**Departmental Library Utilization** (continued)

Recognizing that library utilization patterns might vary at each location, a special survey analysis was run to isolate the prominent use components of each distinct user group. Table 21 provides the results for the central office divisions. The Deputy Minister's Office and the Program Development Division are the most frequent per capita users of the central library. Staff in the Deputy Minister's Office appear to focus on the reference service. The Program Development Division is notable in its use of the professional collection, the current awareness service, information retrieval and the reference service. Planning and Evaluation is a moderate overall user, while Finance and Administration is a relatively low user of the central library, focusing mainly on the professional collection.

Table 22 provides utilization of decentralized library components. Calgary stands out in terms of overall utilization of its library. The specific pattern of use across the libraries is somewhat inconsistent, although use of the professional collection and the reference service is generally highest. Calgary and Grande Prairie staff also focus on special collections, while Lethbridge and Red Deer staff focus more on audiovisual equipment.

Of the provincial schools, staff in the Alberta School for the Deaf are greater overall users of their library. Except for higher utilization of audiovisual equipment in the Alberta School for the Deaf, the basic pattern of use in the provincial schools is similar, with the professional collection and the reference service being most frequently used.

**Table 21**

**Use of Central Library Components ***

| Component | Deputy Minister's Office (n = 5) | Finance and Administration (n = 33) | Planning and Evaluation (n = 55) | Program Development (n = 40) |
|---|---|---|---|---|
| **Resources** | | | | |
| Special Collections | 2.8 | 1.8 | 1.9 | 2.3 |
| Professional Collection | 3.2 | 2.4 | 2.9 | 3.3 |
| Curricular Collection | 1.4 | 1.2 | 1.6 | 2.1 |
| Catalogues | 2.4 | 1.7 | 2.0 | 2.2 |
| External Databases | 2.3 | 1.6 | 1.9 | 2.1 |
| Audiovisual Resources | 1.6 | 1.5 | 1.5 | 2.3 |
| **Services** | | | | |
| Current Awareness | 2.6 | 1.9 | 2.8 | 3.1 |
| Information Retrieval | 3.2 | 1.9 | 2.6 | 3.0 |
| Orientation/Inservice | 1.8 | 1.4 | 1.7 | 1.7 |
| Ordering | 3.0 | 1.8 | 2.2 | 2.5 |
| Reference | 3.8 | 2.1 | 2.6 | 2.9 |

* Scale: 1 - Never; 2 - Rarely; 3 - Monthly; 4 Weekly

**Table 22**

**Use of Decentralized Library Components ***

| Component | Regional Offices | | | | | Provincial Schools | |
|---|---|---|---|---|---|---|---|
| | Calgary (n = 12) | Edmonton (n = 13) | Grande Prairie (n = 7) | Lethbridge (n = 6) | Red Deer (n = 9) | ACS (n = 48) | ASD (n = 31) |
| **Resources** | | | | | | | |
| Special Collections | 3.2 | 2.2 | 2.6 | 2.5 | 2.5 | 1.8 | 2.3 |
| Professional Collection | 3.8 | 2.8 | 3.3 | 3.6 | 3.4 | 3.0 | 3.3 |
| Curricular Collection | 3.0 | 2.2 | 2.5 | 2.8 | 2.6 | 2.2 | 2.6 |
| Catalogues | 2.8 | 2.1 | 2.1 | 1.4 | 2.4 | 2.0 | 2.3 |
| Audiovisual Equipment | 2.6 | 2.5 | 2.2 | 3.0 | 3.0 | 1.5 | 2.8 |
| **Services** | | | | | | | |
| Current Awareness | 3.4 | 2.5 | 2.5 | 1.5 | 2.6 | 2.0 | 2.2 |
| Information Retrieval | 3.3 | 2.7 | 2.3 | 2.0 | 2.3 | 2.2 | 2.6 |
| Orientation/ Inservice | 2.3 | 1.7 | 1.3 | 1.5 | 1.4 | 1.7 | 1.9 |
| Ordering | 3.2 | 2.5 | 2.4 | 2.7 | 2.3 | 2.4 | 2.3 |
| Reference | 3.3 | 2.8 | 2.6 | 2.8 | 2.3 | 3.0 | 3.1 |

* Scale: 1 - Never; 2 - Rarely; 3 - Monthly; 4 - Weekly

## VIII. PROGRAM EVALUATION

### Meeting User Needs

Interviews with professional staff indicated a general overall level of satisfaction, although complaints in specific areas were not uncommon (e.g., particular collections, availability of library staff, etc.).

The survey of users provided the most comprehensive indication of user satisfaction with specific libraries, and with the individual resources and services provided. The results indicate that central office staff are satisfied with the resources and services available from the central library.

Regional office and provincial school staff are less satisfied overall with the performance of their libraries in comparison to external libraries they use (see Table 9) and were somewhat critical of a number of resources and services (see Appendix B-10). Of the library components that were criticized by regional office staff, only the reference, ordering and information retrieval services were considered to be important with regard to usefulness, priority and frequency of use (see Table 11), indicating that regional office staff expectations for quality and timeliness are not being met in these three service areas.

In the provincial schools, books and the ordering service, were considered important library components (Table 11), but were not fully meeting users' expectations for quality and timeliness (Appendix B-10).

Since Alberta Education staff are served from a number of different departmental libraries, it was necessary to determine location-specific satisfaction levels to determine which users were being least well served.

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

Table 23 provides the assessment of the central library components by division (central divisions only). The Planning and Evaluation Division appears quite satisfied overall, as does Finance and Administration. Staff in the Program Development Division are generally well satisfied, but appear to have minor concerns with audiovisual resources, a component they appear to use more frequently than others (Table 21). Staff in the Deputy Minister's Office seem somewhat less satisfied overall, and indicate particular concern with external databases, a component they appear to use more frequently than other central staff (Table 21). Because of the small number of staff in the Deputy Minister's Office, caution should be exercised in interpreting these results. The information appears to indicate, however, that the central library, while providing an excellent level of service overall, is not fully meeting the expectations of all user groups.

Table 24 provides an assessment of the decentralized library components by specific library location. (Caution should again be exercised in interpreting results for the various regional offices because of the small staff numbers.) Of the regional offices, the staff in Grande Prairie appear the least satisfied with their library resources and services, followed by Red Deer, Edmonton and Lethbridge. Perhaps not coincidentally, the level of utilization in these libraries is lower than in the Calgary Regional Office, where staff appear to be highly satisfied. Staff in the regional offices tend to be more satisfied with the library resources than with services. Since these libraries have for many years been storehouses for materials ordered directly by regional office consultants, it is not surprising that they should be somewhat more tolerant of their local collections.

**Table 23**

**Satisfaction With Central Library Components ***

| Component | Deputy Minister's Office (n = 5) | Finance and Administration (n = 20) | Planning and Evaluation (n = 40) | Program Development (n = 35) |
|---|---|---|---|---|
| **Resources** | | | | |
| Special Collections | 3.7 | 4.1 | 4.0 | 3.9 |
| Professional Collection | 3.7 | 4.0 | 4.1 | 4.0 |
| Curricular Collection | 3.8 | 3.9 | 3.9 | 4.0 |
| Catalogues | 3.7 | 4.1 | 4.1 | 3.8 |
| External Databases | 3.5 | 4.0 | 4.1 | 3.8 |
| Audiovisual Resources | 3.8 | 3.8 | 3.8 | 3.7 |
| **Services** | | | | |
| Current Awareness | 3.9 | 3.9 | 4.1 | 4.0 |
| Information Retrieval | 3.9 | 3.9 | 4.2 | 4.1 |
| Orientation/Inservice | 3.9 | 3.9 | 4.1 | 4.0 |
| Ordering | 3.9 | 4.1 | 4.2 | 3.8 |
| Reference | 3.8 | 4.2 | 4.2 | 4.1 |

* Scale: 3 - Somewhat Satisfied; 4 - Satisfied; 5 - Very Satisfied

**Table 24**

**Satisfaction With Decentralized Library Components ***

| Component | Regional Offices | | | | | Provincial Schools | |
|---|---|---|---|---|---|---|---|
| | Calgary (n = 12) | Edmonton (n = 11) | Grande Prairie (n = 7) | Lethbridge (n = 6) | Red Deer (n = 9) | ACS (n = 45) | ASD (n = 28) |
| **Resources** | | | | | | | |
| Special Collections | 4.2 | 3.8 | 3.5 | 3.8 | 3.8 | 3.9 | 3.5 |
| Professional Collection | 4.2 | 3.9 | 3.2 | 4.1 | 3.7 | 3.9 | 3.4 |
| Curricular Collection | 4.0 | 3.7 | 3.2 | 3.9 | 3.8 | 3.7 | 3.5 |
| Catalogues | 4.3 | 3.6 | 3.0 | 3.8 | 3.6 | 3.8 | 3.4 |
| Audiovisual Equipment | 4.1 | 4.0 | 2.8 | 3.8 | 4.2 | 3.8 | 3.5 |
| **Services** | | | | | | | |
| Current Awareness | 4.1 | 3.6 | 3.0 | 3.7 | 3.7 | 3.8 | 3.1 |
| Information Retrieval | 4.3 | 3.7 | 2.3 | 3.8 | 3.1 | 3.9 | 3.4 |
| Orientation/ Inservice | 4.1 | 3.5 | 2.5 | 3.7 | 2.3 | 3.6 | 3.1 |
| Ordering | 4.3 | 3.7 | 2.4 | 3.0 | 3.1 | 3.9 | 3.2 |
| Reference | 4.3 | 3.8 | 3.1 | 3.2 | 3.3 | 4.0 | 3.4 |

* Scale: 2 - Dissatisfied; 3 - Somewhat Satisfied; 4 - Satisfied; 5 - Very Satisfied

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

The Alberta School for the Deaf staff indicated a lower level of satisfaction than the Alberta Correspondence School staff, who appear much more satisfied with their new library resources and services, despite their relatively lower level of utilization in comparison to Alberta School for the Deaf staff.

While users tend to adjust to the scope and quality of the library services available, it is evident that not all users of Alberta Education's libraries are being equally well served. Users' needs for library services are not being fully met in the Grande Prairie, Red Deer, Lethbridge and Edmonton Regional Offices, and in the Alberta School for the Deaf.

The quality of the library services program is a function of the quality of the individual components as implemented in each library location.

**Collections**

Library collections should be developed to handle the more routine requests for facts and the dissemination of professional information. Survey results indicate that the satisfaction with collections ranges from very good in the Central Library and the Calgary Regional Office, to quite poor in the Grande Prairie Regional Office and the Alberta School for the Deaf.

Table 25 provides an analysis of 1984/85 materials acquisitions by the departmental libraries on a per capita basis. Central library expenditures appear to have been extremely cost effective, particularly considering that there was a large non-recurring expenditure during the year to upgrade the reference collection, and also considering the additional utilization of these

**Table 25**

**Per Capita Resource Expenditures**

**(1984/85)**

| Location | Acquisitions | Number of Staff | Per Capita Expenditures | % Spent on Books |
|---|---|---|---|---|
| Central Library | $ 50,572 (1) | 216 | $ 234 | 58% |
| Alberta Correspondence School | 238,767 (2) | 92 | 2,595 | 95 |
| Alberta School for the Deaf | 64,121 | 46 | 1,394 | 94 |
| Calgary | 20,777 | 18 | 1,154 | 80 |
| Edmonton | 38,657 | 29 | 1,333 | 94 |
| Grande Prairie | 15,051 (3) | 9 | 1,672 | 82 |
| Lethbridge | 2,699 | 8 | 337 | 42 |
| Red Deer | 4,580 | 11 | 416 | 58 |

(1) includes $10,000 special upgrade of reference collection

(2) includes start-up costs for collection development

(3) includes Learning Assistance Centre expenditures

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

collections in filling decentralized library information requests. The ratio of expenditures on books/periodicals in the central library is appropriate (i.e., industry norm for special libraries is about 50/50), considering the reference collection upgrade during the fiscal year.

The Alberta Correspondence School figures are difficult to interpret due to the library start-up costs and the fact that this library serves students as well as professional staff. The high proportion of books purchased by the provincial school libraries would not be unexpected, although the ratios appear quite high. The regional office figures indicate dramatic differences in the per capita expenditures and in the proportion of books to periodicals purchased.

The results do not provide any further insight into the specific collection deficiencies in each location, although it would appear that the higher level of per capita expenditures in decentralized locations do not necessarily translate to higher user satisfaction levels. There is also some indication that, where the needs of other users are being provided for (e.g., Alberta School for the Deaf students and the Grande Prairie Learning Assistance Centre), the needs of professional staff are not being fully met.

The high proportion of expenditures in certain regional offices on books is a concern in consideration of the evolution away from curricular interests towards school monitoring and evaluation. The emerging professional needs of regional office staff cannot be adequately met by books where information may be quickly dated. Journals, research reports and external databases provide the most current source of professional information, and more emphasis

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

should be placed on developing strong local periodical collections and on enhancing use of the network to link decentralized libraries with the central library to identify and retrieve pertinent and current professional and research information.

The lack of overall collection policies, and the inconsistencies noted in actual collection maintenance practices have led to weakness and imbalance in the collection component in the decentralized libraries.

**Audiovisual Equipment**

Satisfaction with audiovisual resources was generally good except in the Grande Prairie Regional Office and the Alberta School for the Deaf. The expenditures on equipment and materials varied considerably across the decentralized libraries, with no apparent relation to user satisfaction. The libraries are not the only source of audiovisual equipment in the department, and the central library frequently tracks down branch equipment to satisfy users' needs. User satisfaction may reflect their general perceptions regarding this resource.

**Databases**

Departmental library databases include the UTLAS cataloguing utility and related catalogue products (fiche, printed updates), as well as online bibliographic, numeric and textual databases and specialized in-house databases.

The **catalogue products** used in the decentralized libraries were frequently criticized in interviews with staff. The survey also

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

indicated dissatisfaction in certain locations, with staff in the Grande Prairie Regional Office and Alberta School for the Deaf expressing the greatest dissatisfaction.

There may be several reasons for user criticisms of the catalogue products:

- the resources in each of the regional offices may not all be listed in the catalogue because of incomplete cataloguing and retrospective conversion (as low as 10 - 20% in many offices);

- the catalogue updates come in the form of monthly acquisitions lists which become cumbersome to use in addition to the annual fiche product;

- the fiche format was chosen because of the large size of the union catalogue, although users appear more resistant to fiche than traditional print or card catalogues.

Incomplete and outdated catalogue products, and unwillingness or inability to use the catalogue products may be preventing staff from fully accessing the departmental resources available to them, resulting in lower satisfaction of needs. Few special libraries provide "online" catalogue access for users; however, some improvement in Alberta Education's catalogue products and inservice training are required to improve library utilization and satisfaction. Decisions will also be required regarding the extent to which regional office collections should be catalogued, particularly considering the large number of donated books in these collections.

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

**Online databases** are only available centrally. While the number and types of databases subscribed to by the central library appear adequate, staff in the Deputy Minister's Office who use the databases most frequently may not be receiving the quality of information they expect from these databases. The central library does not engage in a high profile SDI service for executive management to the degree seen in other special libraries, and enhancement of this service may help to improve overall perceptions of the value of these new electronic reference tools. In general terms, however, the online databases are being appropriately used by the central library to complement and supplement the reference and professional collections on-site.

**Network**

The network system between libraries exists only to the extent that librarians have the tools, training and inclination to access the information resources of other libraries in serving users' needs. The network component is most evident in the central library, where statistics are being kept indicating the extent of interlibrary loan activity with other libraries. Policies in the Lethbridge Regional Office and in the Alberta Correspondence School preclude their library resources from being made available to other branches of the department through ILL. The internal network, therefore, has a few "one-way" elements.

The collections in the decentralized offices do not readily support in-depth reference questions, and few decentralized librarians possess the training necessary to respond to such requests. The majority of such requests, therefore, should be referred to the central library or another external library. Table 26 presents an

**Table 26**

**Central Library In-depth Reference Activity**

**(1984/85)**

| Location Served | In-Depth Reference Requests | Number of Professional Staff | Per Capita Reference Volume |
|---|---|---|---|
| Central Divisions | 655 | 216 | 3.0 |
| Alberta Correspondence School | 51 | 92 | 0.6 |
| Alberta School for the Deaf | 13 | 46 | 0.3 |
| Calgary Regional Office | 39 | 18 | 2.2 |
| Edmonton Regional Office | 53 | 29 | 1.8 |
| Grande Prairie Regional Office | 11 | 9 | 1.2 |
| Lethbridge Regional Office | 13 | 8 | 1.6 |
| Red Deer Regional Office | 12 | 11 | 1.1 |

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

analysis of the in-depth reference activity of the central library in serving the various user locations. While the decentralized staff would not be expected to demand the same scope of in-depth reference service, the average per capita frequency should approach that of central office staff, particularly in view of the overall extent to which the reference service is utilized by decentralized staff (Table 22). Only the Calgary Regional Office library uses the central library reference service frequently. The network component, therefore, must be considered deficient in most of the decentralized libraries, resulting in less than optimal satisfaction of the needs of professional staff. It is likely that decentralized staff are in many cases handling their own reference requirements, or are going without the information altogether.

**Reference**

Beyond the regular routing of periodicals and requests for articles from circulation of journal contents pages, the reference service must be considered a key component of the departmental libraries. The survey results (Table 24) point to deficiencies in the reference service provided by the Grande Prairie, Lethbridge and Red Deer Regional Offices and by the Alberta School for the Deaf, symptomatic of their general level of dissatisfaction with their libraries. As a personalized service, the reference component ultimately reflects the capacity of the local librarians to satisfy users' needs through their training and through the quality of individual components at each location.

With regard to meeting users' needs, therefore, the lack of integrated, department-wide policies regarding collection development and maintenance, inadequacies in librarian

## VIII. PROGRAM EVALUATION

**Meeting User Needs** (continued)

qualifications, training and supervision, and the lack of service delivery standards have led to inconsistent implementation of the library services program, and overall discrepancies in the quality of information services provided to staff across the department. These discrepancies are most pronounced in decentralized locations where library program decisions are made in an ad hoc fashion according to local program priorities. Improvements in the library services program will require implementation of standards designed to ensure that all departmental staff, regardless of location, have equal access to the resources and services needed to perform their designated duties.

**Benefits of Library Utilization**

Many of the staff who use the libraries on a regular basis feel the service contributes significantly to their efficiency and effectiveness, some considering it indispensable. The major tangible benefit appears to be the saving of time which staff would otherwise spend searching for and retrieving information. External libraries were not generally considered capable of providing a comparable level of service.

The survey provided additional insight into perceived benefits of library use (Appendices B-7, B-11). Regional office staff appear to derive somewhat greater average utility from their libraries than do central office staff. Decentralized staff also indicate marginally greater average benefits, although the diverse central population (users and non-users) must be kept in mind when interpreting these results.

Benefits from use of libraries are difficult to quantify, and the results from the survey are somewhat inconclusive by specific

## VIII. PROGRAM EVALUATION

**Benefits of Library Utilization** (continued)

function or location. It must be concluded, however, that benefits will be a function of the frequency of use and the overall quality of library resources and services. In this regard, decentralized library users, excepting staff in the Calgary Regional Office, are receiving lower overall benefits from the investment made in their libraries. The pockets of high central use (i.e., consultants, research officers, resource officers), also benefit from direct use of the central library. Perhaps a more important finding, however, is that the libraries serve both professional and managerial levels in the department, all of whom will derive benefits proportionate to their utilization of the libraries.

**Meeting Organizational Objectives**

The library has three major objectives regarding the implementation of library services: to optimize sharing and reduce duplication of resources; to optimize utilization; and to increase efficiency.

**Optimize Sharing/Reduce Duplication**

There are specific problems relating to the library services program which compromise this objective.

- **Collections** - The centralized acquisitions process is being substantially bypassed by the branches, resulting in a risk of duplication in certain professional resources. Cataloguing itself has not been fully implemented in the conversion of decentralized library collections or in other branch resources, resulting in the union catalogue not fully representing the range of resources available for sharing. Finally, no overall policy is in place to govern the

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

development and maintenance of collections, leading to risks in unnecessarily duplicating certain resources. Poor maintenance of collections in certain locations leads to risks that departmental resources may be lost or misplaced and therefore not available for sharing.

- **Databases** - The online databases promote less reliance on collections, thereby reducing unnecessary holdings. There does not appear to be unnecessary duplication in the database subscriptions themselves, since many are paid for on a "per use" basis.

- **Network** - User complaints about the union catalogue imply that it is not being used to the extent it could, resulting in reduced opportunities to share resources among the departmental libraries. The internal network is not being extensively used by decentralized librarians, resulting in some lost opportunities to share the central library resources and reference services.

- **Reference** - A strong reference service helps to promote use of all resources, including collections and online search capabilities. Reference skills and availability of staff in decentralized libraries compromise the reference service, which in turn results in underutilization of available resources. Staff may also tend to purchase materials unnecessarily to help make up for local reference weaknesses.

- **Audiovisual** - Storing audiovisual equipment and materials in the library or other central location is an appropriate

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

model for sharing and reduced duplication of such resources. Audiovisual equipment, however, is frequently purchased directly by branches, with no control to ensure these resources are freely available to be used by others.

The goals of optimized sharing and reduced duplication, while being promoted through the library services program, are not being achieved to the extent possible.

**Optimize Utilization**

The levels of utilization of various resources and services vary quite dramatically across the departmental libraries, and appear low in several locations (i.e., Grande Prairie, Lethbridge, Alberta Correspondence School), indicating potential local problems.

- **Collections** - The composition and quality of local collections is inconsistent, as evidenced by varying satisfaction rates and levels of expenditure per capita. Staff will not use resources with which they are dissatisfied.

- **Databases** - The catalogue products are the major database weakness. Uncatalogued resources are not readily available for use, and problems using catalogues cause frustration and lower the propensity of users to access departmental resources, lowering overall utilization. Internal databases maintained by the central library help to increase access to and utilization of specialized materials (e.g., departmental publications, legislation, etc.).

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

- **Network** - Failure to access the network causes underutilization of departmental resources, particularly the services and materials of the central library, and overdependence on acquiring local materials which will not be utilized frequently due to lower user populations.

- **Reference** - Inconsistent librarian skills cause general dissatisfaction with certain libraries, preventing fuller utilization of the existing service potential inherent in the current departmental collections and databases.

- **Audiovisual** - This component is frequently implemented centrally to increase access and utilization. The library treatment of audiovisual equipment is appropriate, although overall departmental policies regarding purchase and sharing of such equipment may not be leading to optimal utilization.

One of the major factors affecting utilization is awareness. The survey indicated many awareness deficiencies, indicating problems in the overall promotion of the library services program:

. no library newsletter or other vehicle to promote general awareness and utilization (by departmental decree);

. low use of orientation/inservice to enhance staff skills in using the libraries;

. no high profile SDI service to promote better utilization of databases.

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

The goal of increased utilization of library resources and services is not being fully achieved due mainly to inconsistent quality of materials and library staff skills (decentralized locations), low reliance on the departmental library network, and low overall promotion of library awareness.

**Increased Efficiency**

Two areas of efficiency must be considered.

- **User Efficiencies** - The productivity of professional staff is difficult to measure, but indications from the survey and from interviews are that users save time by having a departmental library close at hand. Better catalogue products would improve user efficiencies in locating information, although user productivity would be best served by the increased availability of qualified librarians serving user needs through the local collections and network resources. User efficiencies are, therefore, not being optimized in all locations due mainly to lack of dedicated and qualified librarians attending to staff needs.

- **Library Operational Efficiencies** - Other organizational efficiencies relate to the actual library operations themselves and the deployment and utilization of resources by the libraries.

With regard to the **levels of staff** employed, there does not appear to be misuse of professional staff performing clerical functions, although technical/clerical personnel in decentralized libraries are attempting to perform professional functions (e.g., reference, collection development and maintenance, etc.).

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

The overall **level of automation** within the central library appears appropriate, when considering the additional work load associated with centralized acquisitions and cataloguing. The Innovacq and UTLAS technologies have been used appropriately to reduce the costs associated with acquisitions and cataloguing, particularly for building the Alberta Correspondence School library and for the retrospective conversion of regional office library collections.

Further scope for the Innovacq system may exist in reducing the effort in the decentralized libraries and other branches in keeping duplicate purchasing and financial information regarding materials budgets and expenditures. Online access from decentralized locations to the Innovacq system would be required. Beyond the telecommunications costs which would be incurred, there may be financial policy implications relating to enhancement of the Innovacq system in areas which might be considered to fall within the scope of the overall Departmental Financial System (DFS).

The benefits of the recently acquired BRS system have not been fully demonstrated, although it will be cost-effective if downloaded search citations can be reused as expected. The past emphasis on trade books has made UTLAS very cost-effective in preparing the union catalogue, although in-house alternatives may exist for its ongoing maintenance and for production of the catalogue products, particularly if books become deemphasized in the library collections. Should the decision be made in the future to repatriate the union catalogue from UTLAS and implement a totally "in-house" library system, the BRS system may not be large enough to handle all library functions (e.g., acquisitions, cataloguing, in-house catalogue storage, circulation,

## VIII. PROGRAM EVALUATION

**Meeting Organizational Objectives** (continued)

administration). In the meantime, the system is being used effectively for development and maintenance of other in-house databases such as ERIC documents/abstracts and departmental reports, and the system might be expanded to include parts of the union catalogue for online access by decentralized libraries.

The microcomputer systems are being used effectively to streamline the database searching process, and for handling various administrative and record-keeping functions.

While all decisions regarding technology in the central library have been individually justifiable from the standpoint of improved efficiency, and have been implemented within the framework of departmental technology planning, the lack of an overall plan for the library itself has led to a somewhat ad hoc approach to automation, in that current technologies may not entirely fit within the optimal technological configuration to be developed in Phase Three of this project. This approach to automation, however, is not uncharacteristic of the patterns in other special libraries, including exemplary special libraries, where librarians have aggressively pursued automation, and have employed any and all technology made available to them rather than wait for the "one big system" to be approved.

**Synopsis**

In summary, several problems were noted with the library services program which have hindered the meeting of users' needs and the organizational objectives.

## VIII. PROGRAM EVALUATION

**Synopsis** (continued)

**Problems Meeting User Needs**

- **Collection Deficiencies**
  - lack of policies regarding collection development/maintenance
  - inconsistent per capita spending on library materials
  - inconsistent books/periodicals ratio in collections
  - collections developed for service to external users

- **Database Deficiencies**
  - design of catalogue products
  - incomplete cataloguing of resources
  - low inservice regarding catalogue products

- **Network Deficiencies**
  - inadequate staff skills, training and supervision regarding use of the network to fill user needs

- **Reference Deficiencies**
  - collection deficiencies (above)
  - network deficiencies (above)
  - lack of standards governing delivery of reference services
  - lack of awareness of reference capability

**Problems Meeting Organizational Objectives**

- **Suboptimal Sharing/Risks of Duplication**
  - bypassing of centralized acquisitions to screen purchases for duplication
  - incomplete cataloguing to identify resources available
  - lack of collection policies to govern acquisitions
  - poor collection maintenance to safeguard resources
  - low internal network use to promote sharing

## VIII. PROGRAM EVALUATION

**Synopsis** (continued)

- **Suboptimal Utilization**
  - collection deficiencies leading to user frustration and non-use
  - low use of catalogue products to identify resources available for use
  - low use of network and access of central resources/services
  - lack of marketing to promote utilization of library resources/services

- **Suboptimal Efficiencies**
  - Users
    - low library utilization to locate needed information
    - lack of qualified staff to assist users in locating information
  - Library operations
    - automation somewhat ad hoc and underutilized

These problems are most prevalent in the decentralized libraries.

A more fundamental issue with regard to the library services program is that the libraries do not appear to engage in any formal or systematic segmentation of users according to their functions and information requirements. The central library is currently considering specialization of the reference librarians to provide improved service to specific user groups. The addition of "research librarians" who may be seconded directly to research projects or teams would also be helpful, although this may require some reallocation of existing research officer positions within the department.

## VIII. PROGRAM EVALUATION

**Synopsis** (continued)

The central library has recently instituted a program monitoring/ management information system which gathers pertinent data regarding the performance of various library services, although the system presently focuses primarily on service volumes. Further development is required to provide more evaluative information about the utilization and performance of specific components, and the ongoing satisfaction of users with the services provided. No such monitoring systems are in place in the decentralized libraries.

These problems may be contributing to difficulties in anticipating users' needs, in establishing service priorities, in developing collections and acquiring resources, and in hiring and training staff. In lieu of a formalized planning and evaluation process, the library services program may in the past have relied too heavily for guidance upon "exemplary library practices", although such goals are certainly preferable to having no goals or vision for library services whatever. This three-phase study is essentially the first attempt by the department to develop a proper internal rationale for the program.

## IX. DELIVERY EVALUATION

The evaluability assessment called for answers to a number of key questions relating to **delivery** of the library services program (see page 7). The answers to each question are provided in the sections which follow.

### Library Services Responsibility

The question of responsibility indicates one of the most significant issues in the delivery of the library services program. The Central Library Manager reports to the Director of Financial and Administrative Services within the Finance and Administration Division. Decentralized librarians in most cases report to the office supervisor in their respective branches within the Program Delivery Division. These librarians frequently have other non-library clerical duties, a function which appears to be growing gradually at the expense of library duties. Decentralized librarians did not feel they have a high profile within their organizations.

The existing network of departmental libraries is, for all intents and purposes, a set of independent libraries serving the needs of users in each location. Except for acquisitions and cataloguing which have been almost completely centralized, no formal relationship exists between respective libraries, and the functioning of the network is ultimately reliant upon "goodwill" rather than program policy or delivery standards. Furthermore, the quality of resources and services in each library is largely a function of local decisions, and is not governed in any way by a department-wide commitment to a comprehensive and integrated library services strategy and long-range plan.

Phase Three of this study will be the first significant attempt to formulate a mandate for the program, and to develop the required policies, procedures and mechanisms to guide service delivery in the

## IX. DELIVERY EVALUATION

**Library Services Responsibility** (continued)

future. It has been the lack of such a framework which has contributed to the inconsistent, and in some cases ineffective, implementation of libraries across the department.

**Implementation of Library Components and Services**

Table 27 compares the implementation of components and services in the departmental libraries with the findings regarding other educational and exemplary libraries (Chapter III). The most significant findings can be summarized as follows:

- **Comparison With Provincial Education Libraries** - The central library is operating at a comparable functional level compared to other provincial education libraries, including centralized acquisitions and cataloguing for decentralized libraries. The major differences are:

  . greater overall external database capability, even though the numeric and full text databases are not currently used to their full potential for current awareness/SDI services because of search costs. The BRS system also affords the central library a moderate in-house database capability.

  . lower involvement in research through secondment of library staff;

  . lower marketing and lower overall organizational profile;

  . good inservice capability, despite limited demand;

  . higher level of automation (than some).

**Table 27**

**Comparison of Alberta Education's Libraries**

**To External Libraries**

| | Central Library | Decentralized Libraries | Provincial Education Libraries | U of A Education Library | Exemplary Libraries |
|---|---|---|---|---|---|
| **Collections** | | | | | |
| Reference | Strong | Limited | Strong | Strong | Strong |
| Specialized | Strong | Moderate | Strong | Strong | Strong |
| Curricular | Strong | Strong | Strong | Strong | N/A |
| Professional | Strong | Moderate | Strong | Strong | Strong |
| **Databases (Online)** | | | | | |
| Catalogues | Moderate | None | Limited | None | Extensive |
| Bibliographic | Extensive | None | Extensive | Moderate | Extensive |
| Numeric | Extensive | None | Limited | Limited | Extensive |
| Full Text | Extensive | None | Moderate | Limited | Extensive |
| **Network/ILL** | High | Low | High | High | High |
| **Reference** | | | | | |
| Quick | Strong | Moderate | Strong | Strong | Strong |
| In-depth | Strong | Limited | Strong | Limited | Strong |
| Research | Limited | None | Limited | None | Strong |
| **Current Awareness** | Moderate | Limited | Moderate | Limited | Extensive |
| **Technical Services** | | | | | |
| Acquisitions | Strong | None* | Strong | None | Strong |
| Cataloguing | Strong | None | Strong | None | Strong |
| Circulation | Limited | Limited | Limited | Extensive | Limited |
| **Marketing** | Limited | Limited | Moderate | None | Extensive |
| **Inservice** | Moderate | None | Limited | Extensive | Moderate |
| **Special Services** | None | None | None | None | High |
| **Automation** | Moderate | None | Low - High | Low | High |

* Alberta School for the Deaf and Lethbridge Regional Office libraries purchase their own materials.

## IX. DELIVERY EVALUATION

**Implementation of Library Components and Services** (continued)

- **Comparison With Exemplary Special Libraries** - The central library has a very high capability to serve its users, but cannot be considered at the "cutting edge" in comparison to exemplary special libraries, where:

  . online external and internal databases are more extensively used;

  . library staff are more intimately involved with researchers;

  . a more comprehensive current awareness/SDI service is delivered;

  . marketing efforts and overall profile are higher;

  . library staff are more involved in corporate data processing development;

  . the level and scope of automation is higher.

- **Comparison With University of Alberta** - While the University of Alberta Education library is strong, particularly with respect to its collections, its service capability cannot match that of the central library because of its lower online database capabilities, and because its reference service is restricted. This library operates with a greater self-service approach.

The decentralized libraries generally have lower overall functional capability, particularly with regard to reference services and collections, databases and network activity. The decentralized libraries depend on the central library for in-depth reference, current

## IX. DELIVERY EVALUATION

**Implementation of Library Components and Services** (continued)

awareness, inservice, acquisitions and cataloguing, and do not actively promote their services. In addition, overall collection development and maintenance activities are lacking in several locations.

Despite the fact that the decentralized libraries are not properly equipped to operate as fully independent special libraries, few decentralized librarians make significant use of the network for reference services and information retrieval, with the result that many decentralized users do not have equal access to the information services required to perform their job duties. Failure to access the network is partly due to lack of appropriate reference service standards, but may be more indicative of the level of skills in the decentralized libraries, and the lack of training and supervision received.

**Duplication of Holdings**

The greatest sources of potential duplication relate to branch collections and to regional office library collections.

Financial statistics (Table 17) indicate that $254,119 in materials were purchased in fiscal year 1984/85 directly by the branches, 81% of which did not go through the central library acquisitions systems and were therefore not screened for duplication.

Because most of these purchases are for field testing and are governed by departmental policy, the materials should not be considered as collections per se. The only real potential for unnecessary duplication, therefore, lies with branch-purchased periodicals ($14,646 in 1984/85) the majority of which are not handled centrally. Some

## IX. DELIVERY EVALUATION

**Duplication of Holdings** (continued)

duplication in common periodicals would be acceptable, and further examination is required to determine the actual extent of duplication, although the potential problem is not considered significant.

The question of duplication in decentralized libraries is more a matter of departmental policy. From a purely economic standpoint, the costs of maintaining decentralized library collections and services is high on a per capita basis; however, directors appear disinclined to allocate significant funds to library operations, and it is evident that the resources and services are lacking in certain locations. There may very well be a case for abandoning certain collections in decentralized libraries if they cannot be adequately maintained, depending instead on increased network activity to provide the required resources from collections in other libraries. Candidates for centralization might include the special collections and parts of the curricular collection, particularly as regional offices move towards greater dependence on professional information (i.e., journals).

Clearly this option would only be feasible if greater use were made of the catalogue products, and if better coordination and cooperation were established between the central and decentralized libraries.

**Gaps in Services**

The results of the study indicate significant gaps in service in many of the decentralized libraries, including:

- reference
- current awareness
- marketing
- inservice

## IX. DELIVERY EVALUATION

**Gaps in Services** (continued)

The central library is deficient mainly in the marketing and current awareness areas.

The survey results (Appendix B-12) confirm that many users perceive gaps in library services, with decentralized staff concerned mainly with staffing and materials, and centralized staff concerned mainly with materials. Furthermore, gaps were mentioned twice as frequently by decentralized staff (0.58 gaps mentioned per decentralized respondent compared to 0.29 gaps mentioned per central respondent), indicating a more serious perception of gaps in decentralized locations.

**Duplication of Services**

Some overlap should be provided for in reference services so that local librarians can at a minimum provide quick turnaround on routine reference questions. As presently implemented, there does not appear to be duplication in services; in fact, there appear to be deficiencies in many decentralized locations.

The departmental libraries are not duplicating services available from other libraries. It was made clear in interviews that the major advantages of a departmental library were its proximity to users and the availability of knowledgeable staff dedicated to their needs. Similar scope and turnaround of service cannot be provided by external libraries because of the lower priority given to outside users. Public libraries do not generally provide the specialized services required by a professional organization.

## IX. DELIVERY EVALUATION

### Coordination of Services

Coordination is generally good between the central and decentralized libraries with regard to acquisitions, and with other regular services such as photocopying of articles from circulation of journal tables of contents. The exceptions include:

- The Lethbridge Regional Office and Alberta School for the Deaf do not use centralized purchasing.

- Certain decentralized libraries, such as the Alberta Correspondence School, do not loan out their periodicals or make photocopies on behalf of others.

Cataloguing of new materials purchased by the libraries appears well organized; however, the retrospective conversion of regional office library collections has not been fully implemented. Certain regional offices continue to resist the new shelving system, and there appears to be uncertainty regarding the quantity of older resources and donated books which should be included in the union catalogue. Without formal collection and filing policies for the libraries, there is a risk that unproductive cataloguing will occur. The value of fully cataloguing regional office library collections is somewhat questionable, considering the high degree of duplicate resources in each office which are not likely to be shared frequently between offices.

The reference service appears the most inconsistently delivered in the decentralized libraries due to the limited quantity of reference materials, the lower level of reference skills possessed by librarians, and the reluctance of certain librarians to refer requests to the central library. A better reference service may require more qualified staff, although improvements could be made by implementing reference service standards and training practices which foster increased use of the network.

## IX. DELIVERY EVALUATION

### Central Library Responsiveness to Decentralized Libraries

Decentralized librarians appeared satisfied with the quality and timeliness of services provided centrally. The use of government RITE lines and courier service provides reasonable access and turnaround on reference/retrieval activity. In certain locations where volumes are high (e.g., Edmonton and Calgary Regional Offices), the use of electronic mail and/or facsimile might be a feasible alternative, and might help to foster improved reliance on the network by decentralized library staff.

At certain times, central cataloguing backlogs occur, although the central library tends to ship materials out without cataloguing at times like these in order to meet users' deadlines. The books are returned for final cataloguing at a later date. The Lethbridge Regional Office finds it expedient to purchase certain materials directly without using the centralized acquisition process. Acquisition volumes for the Alberta School for the Deaf have been such that the central library could not take on the additional work load. These are the only significant deviations from the norm practiced by the other departmental libraries.

### Coordination With Other Information Units

There was no evidence that library staff do not refer patrons to other departmental sources of information, although the degree of cooperation and communication between library services and other information units (Corporate Information Services, Computer Systems and Database Management, Communications, Records Services) does not appear to be strong. The relationship, while not antagonistic, appears somewhat territorial.

## IX. DELIVERY EVALUATION

**Coordination With Other Information Units** (continued)

Senior managers particularly expressed the concern that there may be some duplication of service among these units, although users interviewed did not see any confusion between the respective roles of the various information services provided by the department.

**Synopsis**

In summary, the consistent delivery of effective library services is being hampered by the following problems:

- lack of a formal mandate and long-range plan to establish the policy framework for service delivery;
- lack of functional reporting relationships between central and decentralized librarians to assist in exercising centralized quality control;
- lack of department-wide library policies and standards with regard to staffing, training, reference and collection development and maintenance;
- lack of trained staff and deficiencies in overall service capability in decentralized locations.

Beyond the mandate issue which will be rectified in Phase Three of the study, the most significant fundamental weakness in library services delivery relates to deficiencies in the quality and quantity of staff responsible for service delivery in many of the decentralized locations. Good librarians tend to develop and operate good libraries, although their cause would be greatly aided by appropriate organizational profile, support and commitment as demonstrated through endorsement of mandates, policies and procedures regarding library services in the department.

## X. ASSESSMENT OF NEW SERVICES

The evaluability assessment called for a determination of the need for and benefits of a number of potential new library services. The survey results are presented in Appendix B-13, which indicate the perceived usefulness of such services to users in each location. The assessment of each service is presented in the sections below.

### Scanning and Monitoring Publications

This service was noted as the highest priority in all locations, indicating an overall demand for an improved SDI service. The central library does not presently provide this service to the degree found in other provincial education and exemplary libraries, although the capability exists. Because of funding and capacity limitations, however, it will be necessary to be highly selective in the groups of individuals who would receive the service, beginning perhaps at more senior levels where the greatest concerns with the current database capability have been expressed.

In a professional organization such as Alberta Education, the benefits of an enhanced SDI service would be high, both in terms of providing better information, and in savings of user time in unproductive perusal of journals routed routinely to staff.

### Processing and Interpreting Information

Both the interviews and the survey indicated users would not feel comfortable with the librarians actually interpreting retrieved information. Users generally felt the librarians were not familiar enough with their function to properly analyze and interpret the information.

The benefits of such a service would likely be low unless the libraries acquired a staff of research librarians who could be dedicated to specific user areas or projects, a need expressed by several users.

## X. ASSESSMENT OF NEW SERVICES

### Reformatting Bibliographies

This service was rarely mentioned by users, and the survey indicated the service was considered only moderately useful. This service is currently available through the central library BRS system which can be used to reduce the effort in producing bibliographies for reports and curriculum publications. Depending on the volume of such work, the benefits could be significant, although an electronic interface between the BRS system and the various departmental word processing systems would be required.

### Staff Orientation

The interview and survey results indicated a relatively strong demand for orientation and training of new staff. The service is presently available and provided on an "as requested" basis by the central library.

The benefits of staff orientation are somewhat intangible, as are the benefits of any promotional/marketing initiative. The fact remains, however, that awareness is a precursor to utilization. Coupled with appropriate general and personalized follow-up measures, the benefits of orientation would be considered high. Different levels of orientation would be required depending on the type and level of staff involved. All new staff should be properly oriented to the departmental libraries.

### Online Access to Databases

Regional office staff seemed most interested in access to online databases and to the holdings of departmental and external libraries, while provincial school staff were more concerned about online catalogues than databases. The indications are, however, that database

## X. ASSESSMENT OF NEW SERVICES

**Online Access to Databases** (continued)

access by decentralized libraries is not a high priority. Considering the potential costs of such capabilities (technology and staff training), online database searching might better remain on a centralized basis. Decentralization of this capability should be justified on a location-by-location basis, taking into consideration the following factors:

- local librarian training and search skills
- local research needs and search/ILL volumes
- hardware/software costs
- operating costs
- turnaround requirements

**Communication Links**

Despite the interest expressed by some users for electronic communications between locations, turnaround time from the central library did not appear to be a concern. The use of the government RITE system and courier services have no direct incremental cost for library business volumes, so that little economic justification can be seen for direct links via electronic mail or facsimile.

Benefits would relate mainly to improved functioning of the network. Since internal network use is a current weakness in the library program, there may be some strategic justification for further collapsing the time and space between libraries in order to promote use of the network and sharing of departmental resources. Such capabilities, however, should be implemented within the framework of the departmental communication and delivery system between branches and regions.

## X. ASSESSMENT OF NEW SERVICES

### Other Services

Users' main concerns related to specific problems with existing resources and services, and few new requirements were voiced other than end-user database searching. Studies have demonstrated, however, that the novelty of user searching tends to wear off, and the task eventually falls back in the hands of trained librarians.

The review of current practices and trends in special libraries (Chapter III) indicated some potential new areas of service, including:

- records management
- information services consulting
- newsletters

The first two services are very much dependent on the library services mandate yet to be developed. While it may not be feasible within the present environment for the libraries to assume responsibility for records management, or to be involved in information services consulting, it would behoove the department to obtain input from the library in the long-range planning for information and records systems. Studies are currently underway in this regard, and it is presumed a coherent and integrated departmental strategy for information services will evolve, one which includes the libraries as an important participant.

The issue of marketing through a variety of means has already been addressed; however, the use of newsletters, individually crafted and targeted for specific user segments, could be a very significant means of enhancing the profile of the library, and improving overall utilization and satisfaction. Newsletters might include:

## X. ASSESSMENT OF NEW SERVICES

**Other Services** (continued)

- new acquisitions or services
- new staff
- pathfinders
- announcements of orientation sessions
- general/topical SDI
- articles written by staff (e.g., brief literature reviews)

**Synopsis**

Of the new services discussed above, the greatest need is considered to be improved scanning, monitoring, screening and summarizing of information on behalf of users, with an increased emphasis on SDI. The value added orientation is clearly being demanded by library users, although users do not appear comfortable with librarians interpreting information on their behalf. Staff orientation and a library newsletter are considered important promotional vehicles to improve awareness and utilization of library services. Electronic database access by users and communication links between locations do not appear to be a high priority.

## XI. SUMMARY AND CONCLUSIONS

### Introduction

Alberta Education delivers a range of library services to its professional and managerial personnel through a network of libraries, consisting of the central library in the Devonian Building (Edmonton), and decentralized libraries in the five regional offices (Calgary, Edmonton, Grande Prairie, Lethbridge and Red Deer) and the two provincially administered schools (Alberta Correspondence School and Alberta School for the Deaf).

In 1985, the department initiated an evaluation and planning process intended to clarify the future role and direction of its library services. The first step in the planning process was to conduct an **evaluability assessment** to determine the extent to which the library services program structure was amenable to evaluation, and to provide the methodology for conducting the evaluation.

The evaluability assessment (Phase One) was completed in June of 1985, and presented a profile and description of library services, the evaluation issues, the options for evaluating the program, and the prescribed approach for subsequent phases of the study.

- **Phase Two** - An external effectiveness evaluation to determine the manner and extent to which the library services program achieves its goals and produces effects.

- **Phase Three** - The development of a long-range plan (3 to 5 years) for library services.

This report presents the findings, analyses and conclusions of the external effectiveness evaluation (Phase Two) conducted between September 1985 and March 1986 under the guidance of the Library Services Evaluation Steering Committee. The purpose of the study was

## XI. SUMMARY AND CONCLUSIONS

**Introduction** (continued)

to identify the strengths and weaknesses of the library services program and to provide guidance to the interdivisional Steering Committee regarding key program and service delivery issues to be considered in developing the long-term plan for library services (Phase Three).

**Study Methodology**

The approach to conducting the study was prescribed in the evaluability assessment which identified the following key areas of evaluation.

- **Program** - the extent to which the library components meet the needs of the department.
- **Delivery** - the efficiency and effectiveness with which the program is being implemented.
- **New Services** - the need for and benefits of potential new services.

Information for the evaluation was derived from both external and internal sources.

**External Sources**

- **Literature Review** - current practices and trends in special libraries;
- **Interviews** - with librarians from three provincial education libraries (Saskatchewan, Manitoba, Ontario), three exemplary special libraries (Amoco, Booz-Allen & Hamilton, Home Oil) and the University of Alberta education library.

## XI. SUMMARY AND CONCLUSIONS

### Study Methodology (continued)

#### Internal Sources

- **Survey** - of 429 professional and managerial staff in the department (340 survey returns);
- **Interviews** - with the five education officials, 12 library staff members, and a sample (48) of departmental managers and professionals;
- **On-site Observations** - of the eight departmental libraries;
- **Documentation Review** - library financial information and operating statistics.

### Study Findings

The findings from each source of information are summarized below.

#### Current Practices and Trends in Special Libraries

The literature review and interviews with external special librarians suggest that, in many organizations, special libraries play an important role in the delivery of information services, and are increasingly evolving towards **value added** services where retrieved information is further packaged by the library for the end user (e.g., scanning and monitoring of journals, summarizing of retrieved information). Special libraries may be large or small, and may be centralized or decentralized depending on the needs of the organization, although decentralized libraries are normally self-sufficient in end-user services.

Special libraries are usually staffed by full-time **professional librarians** assisted as required by clerical support staff. The better special libraries tend to report to senior management and

## XI. SUMMARY AND CONCLUSIONS

**Study Findings** (continued)

enjoy a relatively **high profile** in their respective organizations.

Users of special libraries include both **researchers** who require project-specific information, as well as **managers** who require ongoing professional information to stay current in their field. Services are sometimes provided to outside users, although the priority is generally lower.

Typical special library components include:

- a relatively small **collection** of books, journals and reference materials optimized to support urgent or frequent information requests;
- a **catalogue** of the local library collection;
- online access to extensive **databases** of information;
- heavy emphasis on **network/interlibrary loan** activity to procure materials not available in the local collection.

Typical special library services include:

- a highly specialized **reference** service supported by computerized database searches;
- a highly proactive **current awareness** service to keep clients up-to-date in their respective areas;
- **marketing** and **promotion** to foster increased library ..ilization;
- **technical services**, including acquisitions, cataloguing, circulation, etc.

With regard to automation, special libraries have tended to be at the **leading edge** in their use of information technology, although

## XI. SUMMARY AND CONCLUSIONS

**Study Findings** (continued)

many have implemented automated systems in a somewhat **ad hoc** fashion.

Recent trends in special libraries include:

- use of management and goal-directed **operating statistics** to provide ongoing evaluative information;
- provision of highly tailored **executive information services**;
- direct **secondment** of library staff to research projects;
- participation in corporate **records management**;
- participation in corporate **information systems** design and implementation;
- information delivery via **electronic mail** and **facsimile**;
- use of **CD-ROM** (digital disks) for in-house databases.

Advancements in information technology are dramatically enhancing the capabilities of special libraries to meet the needs of their users.

**Survey Findings**

The completed questionnaires were analyzed by the location and function of the respondents to identify significant patterns. The findings may be summarized as follows.

- **Information Needs** - Professional and curricular information sources are most frequently used, with print sources (books, journals, etc.) being the most prevalent. Information is important for both research activities and for keeping staff up-to-date in their professional areas.

## XI. SUMMARY AND CONCLUSIONS

**Study Findings** (continued)

- **Sources of Information** - Staff most frequently derive information from sources close at hand (e.g., personal contacts, branch resources, personal books, etc.), with formal library sources used somewhat less frequently. Alberta Education's libraries, however, are used more frequently than external libraries, and generally more frequently than other departmental information units.

- **User Assessment of Departmental Libraries** - Staff awareness of the major library resources and services is generally high. The professional collection and reference service were generally found to be most important, although decentralized users also focus on curricular resources. Decentralized staff appear to use their libraries somewhat more frequently and derive greater utility on average than central staff, although significant pockets of high central use were noted. User satisfaction is quite high centrally, but noticeably lower in the decentralized libraries except for the Calgary Regional Office and the Alberta Correspondence School. The major benefits of library use relate to quick access to quality information.

- **New Services** - Many users noted gaps in existing library capabilities, particularly in staffing, resources and services. Users seem most interested in enhanced **value added** services (e.g., scanning of publications, screening/summarizing of information), as well as indirect access to the holdings of external libraries. Most users feel the libraries should serve the department, although decentralized users also consider it important to serve the school systems.

## XI. SUMMARY AND CONCLUSIONS

### Study Findings (continued)

The survey results indicate weakness in the holdings and services in many of the decentralized libraries, although users in most cases indicate moderate satisfaction with their libraries.

### User Interview Findings

Library users were interviewed to determine their information needs and satisfaction with the libraries. The results may be summarized as follows.

- **Central Office Staff** - Information needs vary widely across central office staff, with the Program Development and the Planning and Evaluation Divisions most in need of information available through the library. Library utilization and satisfaction are quite high, with most users indicating a desire for highly personalized, proactive, value added reference and current awareness services.

- **Regional Office Staff** - The change in role for consultants has shifted needs somewhat from curricular to professional information. Consultants and some directors are relatively frequent users of their libraries, although satisfaction levels vary by location. Most users prefer the current decentralized delivery system, and many feel services should also be made available to users outside the department.

- **Provincial School Staff** - The provincial schools have unique needs for both curricular and professional information. The libraries are used frequently, although satisfaction with the Alberta Correspondence School library is higher than with the Alberta School for the Deaf library. Users feel the school

## XI. SUMMARY AND CONCLUSIONS

**Study Findings** (continued)

libraries should concentrate on collections and related reference services, with the central library providing in-depth database and interpretive reference services.

- **Education Officials** - The officials feel the libraries should focus on departmental needs, and should avoid implementing services or capabilities before the demand and benefits have been demonstrated. They also feel that the current decentralized approach to service delivery is appropriate, but that more senior level planning input is required to guide service delivery.

**Library Operation Findings**

The results of interviews with librarians and the review of library documentation may be summarized as follows:

- **Librarian Interviews** - The decentralized library staff frequently lack the skills and the time needed to provide the level of service to which central library users are accustomed. Many feel uncertain about the respective roles of the central and decentralized libraries and the degree of decentralization that is appropriate. The level of managerial commitment to library services is considered low, particularly in the decentralized locations where library staff do not have a high profile and sense a lack of training and career development opportunities. Library inservice training available from the central library has not had a high priority in the decentralized branches.

## XI. SUMMARY AND CONCLUSIONS

**Study Findings** (continued)

- **On-site Observations** - There is considerable inconsistency across the libraries in the implementation of various components and services, with many decentralized libraries lacking the basic resource and service capabilities demonstrated by the central library (e.g., collections, databases, reference, current awareness, etc.). Certain of the decentralized libraries do not use the central library extensively to fill in local gaps.

- **Documentation Review** - Departmental financial information indicates that 2% of expenditures go toward library services. The central library accounts for 67% of this total, due in part to a significant service work load for the decentralized libraries (i.e., acquisitions, cataloguing, photocopying, reference, interlibrary loan, database searches). Branches also acquire materials, most of which are purchased for field testing purposes and are not considered part of formal library collections.

  The central library collection is used to fill approximately 90% of quick-reference questions, while 86% of in-depth reference questions are referred to outside libraries (e.g., University of Alberta, national/international libraries), indicating appropriate collection maintenance practices and healthy network activity in the central library.

**A Special Library Model**

The evaluation of library services requires an understanding of the **rationale** for implementing a special library program. The decision to establish and maintain a special library is predicated on the need

## XI. SUMMARY AND CONCLUSIONS

**A Special Library Model** (continued)

to provide employees with information in order for them to perform their jobs more effectively. The key economic issue in library services is the trade-off between the implicit **value of timely information** to the users (maximized by decentralizing information resources) and the explicit **costs of providing this information** (minimized by centralizing costly human and material resources).

In order to develop the appropriate level of resources, it is critical to understand users' job functions and information needs. Employees access a wide variety of information sources, and tend to use **sources at hand** (e.g., own books, telephone, files, etc.) more frequently than **remote sources.** The special library is only one of many complementary suppliers of information services.

The library **collection** normally serves routine requests for factual or professional information, while non-routine information is obtained by accessing the library **network**, frequently using databases to locate the required information which is then retrieved through interlibrary loan. The **catalogue** is in place so that users may be aware of library resources, thereby increasing utilization and decreasing duplication. Of all components, however, the heart of the special library is its **reference** service, the quality of which is influenced by the skills of library staff and the quality of the other library components.

A special library, if it is operating effectively, will meet users' needs for the quality, quantity and timeliness of information, as well as the organization's overall expectations for efficiency of operation and utilization of resources. In a decentralized environment, the network of libraries requires particular attention to ensure consistent delivery of services to all users, and to foster the cooperation among libraries necessary for efficient utilization of resources.

# XI. SUMMARY AND CONCLUSIONS

## Evaluation of Library Services

The evaluability assessment called for the evaluation of the library services program in three major areas: program, delivery and new services.

### Program

With regard to the library program, the key evaluation issues relate to meeting users' needs for information and satisfying organizational objectives for efficient utilization of resources.

#### Meeting User Needs

The findings indicate that decentralized staff use their libraries **more frequently** and **more exclusively** than do centralized staff, and that they also place a higher priority on maintaining library resources and services, indicating a higher overall dependency on the library as a source of information. The central office location comprises a more diverse professional population, including both users and non-users of the library, although significant groups of high central library use were noted (e.g., consultants, research officers, resource officers).

The use of various library components varies across central divisions and the decentralized offices, although the **professional collection** and the **reference service** are generally in strong demand. Decentralized users also demonstrate a need for **curricular resources.** The interviews and survey of professional staff indicate generally good satisfaction levels, although various complaints with staffing and resources were made. Except for the Calgary Regional Office and the Alberta Correspondence School, the decentralized staff are clearly less satisfied than users of the central library. Differences in satisfaction levels can be attributed to:

## XI. SUMMARY AND CONCLUSIONS

**Evaluation of Library Services** (continued)

- deficiencies in certain collections, with varying expenditure levels and allocations (e.g., books, periodicals, etc.) and a lack of policies regarding collection development and service to external users;
- incomplete cataloguing and underutilization of catalogue products;
- deficiencies in the functioning of the internal library network due to inadequate staff training and supervision;
- deficiencies in the reference service due to staffing and collection weaknesses.

These problems are most pronounced in the decentralized locations where library decisions are made in an ad hoc fashion according to local program priorities. The result is that staff across the department do not have equal access to the information required to perform their duties.

**Meeting Organizational Objectives**

On the whole, the departmental libraries are striving towards efficient utilization of resources; however, the objectives for library services are not being fully achieved. Specific problems include:

- **Inadequate Sharing and Risk of Duplication** - Some purchases of branch periodicals are bypassing the centralized acquisition system, with the attendant risk of unnecessary duplication. Not all departmental materials have been catalogued, resulting in lost opportunities to share these resources. The absence of policies governing collection development and maintenance may also lead to unnecessary duplication, particularly with the low reliance on the internal network for sharing resources.

## XI. SUMMARY AND CONCLUSIONS

**Evaluation of Library Services** (continued)

- **Underutilization of Resources** - Weaker decentralized library collections and problems with current catalogue products may be causing underutilization of the decentralized libraries in general. The relatively low level of marketing and promotion may also be leading to low awareness and consequent underutilization of certain library components.

- **Inefficiencies** - Where libraries are poorly maintained and staffed, and where low utilization has been noted, staff inefficiencies in locating needed information are inevitable. Operational efficiencies have been achieved throughout, although more potential may exist to reduce duplication in branch record keeping regarding materials acquisitions and budget monitoring.

**Delivery**

With regard to service delivery, the key evaluation issues relate to responsibility, duplication and gaps in service.

**Responsibility**

To a large extent, each departmental library is an independent entity with no formal relationship governing quality of resources and services implemented, or the interaction with other libraries. The absence of a formally articulated **program framework** (i.e., mandate, policies, standards) has inevitably led to inconsistencies in library components and in the services delivered.

A reasonable level of coordination exists among the libraries in acquisitions and cataloguing. The delivery of reference services, however, is not as well coordinated, due mainly to a reluctance by decentralized librarians to access the internal network, even

## XI. SUMMARY AND CONCLUSIONS

**Evaluation of Library Services** (continued)

though the central library is meeting decentralized requests in a timely way.

**Duplication**

Except for structural duplication in the regional office libraries which may be reduced through centralization of certain elements of special, curricular and reference collections, the only potential for duplication resides in branch purchases of periodicals. Further investigation of specific collections may be required, but the extent of duplication is not likely to be significant in view of the unique roles and information requirements of each branch.

The departmental libraries do not appear to be duplicating resources and services available through external libraries, which cannot readily provide the service scope and turnaround required by department staff.

Users did not perceive any overlap in the services provided by the various departmental information units, although the potential exists for more involvement of the libraries in delivering executive information services, and in the general planning, development and implementation of departmental information and records systems.

**Gaps**

Due to the deficiency in collection policies and service standards, and inconsistencies in funds allocated to the various libraries, resources and services are lacking in certain locations. Decentralized users have noted specific gaps in staffing and materials, while central users noted problems with materials.

## XI. SUMMARY AND CONCLUSIONS

**Evaluation of Library Services** (continued)

In general terms, the libraries do not promote their capabilities to any significant degree, particularly their unique capability for highly tailored **current awareness** services. As a result, the existing potential for service delivery is not being fully realized.

**New Services**

With regard to the need for and the potential benefits of new services, the area considered most desirable was for library staff to provide more **extensive value added services**, such as routine scanning and monitoring of publications to notify users of relevant developments in their particular areas. Current capabilities for such high profile, proactive services are not being fully utilized, and are one of the more notable deficiencies of the department's library services in comparison to other special libraries.

Another important service area to be improved is staff **orientation/ inservice**, which would help to increase overall awareness and utilization of current resources. Subject to departmental policies, it would also be beneficial for the libraries to publish their own **newsletter** to aid in overall promotion of existing and emerging capabilities.

With regard to other new service areas which special libraries are beginning to deliver, the department should consider obtaining input from its librarians on matters relating to **records management** and **information systems planning and development** because of their strong user orientation and information retrieval skills. Consideration should also be given to providing access to **research librarians** who would be seconded from the library to work on

## XI. SUMMARY AND CONCLUSIONS

**Evaluation of Library Services** (continued)

specific research projects to assist in gathering, summarizing and interpreting information.

**Conclusions**

Despite the number and variety of concerns disclosed by the user survey and interviews with professional staff, the department's library services have many strengths, and are meeting the expectations of users in many locations. Perhaps the greatest strength of the libraries is their **proximity to users**, and the fact that library staff have been designated in each location to serve the information needs of the users.

The vast majority of departmental staff are better served by the current internal library system than they would be by external libraries because of the local availability of resources and special services tailored to the unique needs of the department; however, the full potential inherent in the current library resource and service capability is not being achieved. The fundamental cause of current weaknesses rests ultimately with the fact that a program framework has never been formally articulated for library services. In the absence of a clear program mandate based on a thorough analysis of professional needs and available delivery alternatives, it has been difficult to develop a coherent library services strategy, with comprehensive policies regarding such matters as:

- funding and resource allocation;
- staff qualifications and functional reporting relationships;
- collection development, maintenance and inventory control;
- service delivery standards;
- centralization/decentralization of resources.

## XI. SUMMARY AND CONCLUSIONS

**Conclusions** (continued)

It is not surprising, therefore, that the quality of each of the departmental libraries reflects the perceived **priorities in each location rather than a department-wide vision** for a consistently high quality professional support system, available to all staff regardless of location or functional level.

Symptomatic of the **lack of policy direction** are many of the problems which have been noted in library services in the department, including:

- differences in expenditures on library resources, and inconsistencies in the quality and quantity of local collections;
- inappropriately high ratio of books to periodicals and other resources;
- weaknesses in the maintenance and management of some library collections;
- lack of agreement on the levels of service to be provided to users outside the department;
- deficiencies in the qualifications of library staff;
- insufficient availability of library staff (i.e., part-time staff, clerical duties);
- incomplete use of centralized acquisitions;
- incomplete cataloguing of departmental resources;

## XI. SUMMARY AND CONCLUSIONS

**Conclusions** (continued)

. low internal library network utilization;

. lack of orientation/inservice training.

The ad hoc development of library computer systems also reflects the overall lack of guidance which would have been provided by a clear mandate and policy framework.

These matters are considered **planning and design limitations** of the departmental library services program, and do not necessarily indicate deficiencies in the operation of the libraries themselves. In fact, library staff have, for the most part, done an admirable job in meeting local needs and demands, and have demonstrated the desire and dedication to improve service capabilities. There are, however, two notable deficiencies in the delivery of library services which are considered to be within the scope of the libraries to address.

- **Marketing** - There is presently little marketing and promotion of library services, particularly those relating to **value added current awareness services** directed at management levels. These are services which the other provincial education and exemplary special libraries appear to be providing to a greater degree. The libraries have not been successful in promoting the value of certain external databases, and their image has suffered as a result. Work will be required to establish a better and closer working relationship with all levels of management within the department to fully utilize the service capabilities inherent in these databases.

- **Evaluative Statistics** - There has been a relatively low emphasis on gathering operational statistics, particularly by the

## XI. SUMMARY AND CONCLUSIONS

**Conclusions** (continued)

decentralized libraries. Steps are being taken to address this weakness, although additional work will be required to develop a comprehensive evaluative management information system for the libraries which serves to inform librarians as well as management of the performance of the department's libraries.

## XII. GUIDELINES FOR PHASE THREE

The major weakness of the departmental library network remains the absence of a formal mandate and policy framework. This issue has been recognized by both previous and present management personnel, although it has taken some time to commission the study needed to address the future of the library services program. With regard to development of the long-range plan for library services (Phase Three), the department should consider the following matters.

### Mission

The new mandate for library services should provide a clear vision for the development of policy and the delivery of services, with one overriding goal: to provide for **equal information access** by all professional staff in the department, regardless of location.

The following principles were established in the June 29, 1982 memo from the Deputy Minister regarding the plan for reorganization of the department.

- Alberta Education is a professional organization, with an emphasis on planning, innovation, experimentation and use of external expertise.

- Professional staff operate in a complex, dynamic and uncertain environment, which must be constantly monitored in order for the organization to respond and adapt.

- The department is operationally complex with a wide variety of activities and services, requiring a structure and support systems which maximize the potential of its staff.

There is unquestionably a valid and essential role for library services in helping to support these organizational principles. All

## XII. GUIDELINES FOR PHASE THREE

**Mission** (continued)

staff should have access to the information resources and services necessary to carry out their responsibilities effectively and efficiently, regardless of their function and location. The mission for library services should reflect this requirement, and should establish the extent to which value added services will be embraced within the operating philosophy of the libraries. The department should be prepared to take whatever steps are necessary to ensure consistently high standards of service in its libraries. Such a goal may well imply additional program costs to upgrade library services in certain locations, although the current strategy for service delivery should be reviewed with a view to identifying cost savings through more streamlined operations.

**Policy Development**

The long-range plan for library services should establish appropriate library policies, guidelines and procedures in the following areas:

**Library Organization**

- librarian qualifications, job descriptions, training and performance appraisal
- functional reporting relationships between central and decentralized libraries

**Collection Development and Maintenance**

- expenditure guidelines for materials
- collection content and purpose
- collection maintenance and inventory control

**Library Operations**

- acquisitions (library collections and branch materials)
- cataloguing (new purchases and retrospective conversions)

## XII. GUIDELINES FOR PHASE THREE

**Policy Development** (continued)

- reference/network activity (all libraries)
- inservice (librarians and new staff)
- priority of serving external users
- library services marketing

The major obstacles to improving library services are structural in nature, and policy is required to guide program and delivery decisions. The Library Evaluation Committee may wish to establish appropriate subcommittees to work out policy details and implementation tactics once the major strategic issues have been resolved.

The greatest attention should be paid to improving library service to decentralized users, since these individuals are highly dependent on their libraries as a source of job-related information, and suffer the most with respect to inconsistencies in resource and service capabilities in their libraries. In this regard, it would be advisable to review the current policy of allocating discretionary funds to individual consultants for purchase of materials. While a measure of local autonomy should be allowed, this policy has led to some of the inconsistencies in local collections, and hampers proper library collection development and maintenance efforts.

While staffing and resources are critical issues, it is important that the new policies also help to foster improved performance of the internal network through increased interaction between centralized and decentralized library staff. Decentralized library staff who are reluctant to refer user information requests to the network constitute an obstacle to improved service delivery.

Without necessarily compromising the authority of directors over local library decisions, increased central input into collection development

## XII. GUIDELINES FOR PHASE THREE

**Policy Development** (continued)

policy, service delivery standards, library planning and evaluation, and staff recruitment, training and evaluation should be considered.

**Program and Delivery Standards**

The libraries should establish specific standards for the performance of each component and the delivery of library services, including:

- fill rates
- turnaround times
- utilization rates

A variety of statistical measures for public and special libraries has been developed in the above general categories which help to provide a yardstick for the ongoing evaluation of program performance. Such standards should be developed for all departmental libraries, and should be monitored on an ongoing basis as part of the comprehensive management information system being developed by the central library.

A mechanism is required to foster greater teamwork and joint responsibility between central staff and decentralized management for the delivery of library services. It may be beneficial for a form of "charter" to be drawn up between each decentralized director and the central library which establishes the operating philosophy and goals relating to library service delivery, and the respective responsibilities of central and decentralized staff in providing user services.

The central library would then be responsible for monitoring the performance of all libraries, and for making recommendations and assisting directors in the implementation of improvements as required.

## XII. GUIDELINES FOR PHASE THREE

### Planning and Evaluation Cycle

The long-range plan for library services should establish the cycle for periodic program planning and evaluation, including the frequency and process for:

- needs assessment
- program planning
- program evaluation
- service delivery evaluation

Not all such activities need be performed on the same cycle. A frequent problem with many programs, including the department's library services, has been the absence of routine, formal planning and evaluation exercises. Performed on a regular basis, such activities should prove no more time-consuming than if performed at longer intervals, and should help ensure that the library program adapts dynamically to the needs of the department.

### Departmental Integration

The long-range plan and optimal technological configuration for library services should be based on the overall departmental goals and strategies for information services presently under review.

The scope of the library services program is proving an increasingly difficult concept to define, particularly as automation enhances the capability of the libraries to deliver information services. The traditional boundaries of responsibility over internal versus external information are blurring, as are the rules that govern the implementation of computerized information systems within the organization. The plan for information systems should stress increased integration of the various departmental information

## XII. GUIDELINES FOR PHASE THREE

**Departmental Integration** (continued)

services, and a more prominent role for the libraries in the planning process.

**Program Delivery Options**

The department should consider, on a location by location basis, the increased centralization of library resources and services.

Notwithstanding the present departmental philosophy regarding decentralization, sufficient benefits must be demonstrated to justify the costs of maintaining a library in each location. Current practice indicates that the library is not a particularly high priority in some locations, with the result that only a token effort is made towards maintaining the local collections and providing reference and current awareness services. It would be understandably difficult for many decentralized directors to justify the costs of a fully self-sufficient local library; however, some measures are necessary to ensure professional and managerial staff have equal access to consistently high quality library services at each location.

There are three major service delivery alternatives which the department should consider in developing its long-range plan for library services; these represent a complete spectrum of options, from highly decentralized to highly centralized service delivery.

**Option 1 - Maintenance of Decentralized Libraries**

This option would essentially maintain the status quo, with centralization of acquisitions/cataloguing and other services (current awareness, inservice, etc.) at the discretion of the individual branch; however, library policies and service delivery standards would be implemented to **strengthen local staff and**

## XII. GUIDELINES FOR PHASE THREE

**Program Delivery Options** (continued)

**resource capabilities** and to **improve the functioning of the library network.** This option would imply additional costs, but would maximize the service capability of the departmental library system.

**Option 2 - Selective Centralization of Library Components**

Where user numbers in certain locations do not warrant the allocation of a full-time professional librarian and associated resources, there may well be both cost savings and service improvements by filling the needs of decentralized users from one or more central locations. This option assumes that a professional librarian located centrally but dedicated to serving the needs of a small group of decentralized users, could provide equally good or better service than a local clerk with conflicting duties and inadequate training and resources.

Depending on local demands, the following components might be candidates for centralization:

**Services**

- in-depth reference/information retrieval
- current awareness
- orientation/inservice

**Collections**

- unauthorized classroom materials
- selection aids
- computer courseware
- special education resources
- Alberta Education documents

## XII. GUIDELINES FOR PHASE THREE

**Program Delivery Options** (continued)

On-site clerical or technical staff in decentralized libraries would be used mainly for maintenance of local collections, and for providing limited quick reference services. Local collections might consist only of professional resources, authorized curricular resources, and appropriate catalogues. The changes in regional office consultant responsibilities will result in lower dependence on curricular resources, although authorized curricula will remain important. Greater emphasis, however, would be placed on establishing sound professional collections (particularly journals) to support the emerging professional needs of staff. The trend away from expensive book materials towards less costly periodicals suggests that strong local professional collections could be maintained at an acceptable cost, particularly if portions of the specialized and curricular collections could be centralized.

**Option 3 - Selective Centralization of Library Facilities**

There may be justification for closing libraries at certain locations, delivering all library services and housing the formal library collections in another location. Local professional staff would be allocated limited funds to acquire "personal book collections" to be kept on permanent loan in their own offices, and would also subscribe directly to journals of interest. All acquisitions, however, would be centralized in order to screen for potential duplication and to catalogue the resources if required.

Within this option, the following alternatives might be considered.

- **Minimal Consolidation** - Close the Lethbridge, Red Deer and Grande Prairie Regional Office libraries, and serve Grande Prairie staff from the Edmonton Regional Office library, and Lethbridge and Red Deer staff from the Calgary Regional Office

## XII. GUIDELINES FOR PHASE THREE

**Program Delivery Options** (continued)

library. Since staff in smaller regional offices might feel somewhat isolated without a local librarian, special measures would be required to ensure frequent contact between these professionals and their "designated central librarian" to build up the credibility necessary for user support of the new delivery system.

- **Moderate Consolidation** - In addition to the above, close the Edmonton Regional Office library, and serve Grande Prairie and Edmonton staff from the central library. The proximity of the Edmonton Regional Office to the Devonian Building (central library) suggests the possibility that current duplication of resources and services could be reduced, although the large number of professional staff in the Edmonton Regional Office may justify some local service capability.

- **Maximum Consolidation** - Close all regional office libraries, and maintain only the central library and the two provincial school libraries. This alternative would only be feasible if extremely strong communication and delivery channels were implemented to ensure close and frequent contact with users and prompt turnaround of information.

Little justification can be seen for closing the Alberta School for the Deaf library under its current operating mode; however, the implementation of Response Centres will dramatically change the research and professional information needs of staff, some or all of which might be delivered centrally. The proximity of the Alberta Correspondence School to Edmonton may generate opportunities for centralization of certain library components (e.g., special collections), although it is difficult to see how teachers' curricular needs could be met without a local library.

## XII. GUIDELINES FOR PHASE THREE

**Program Delivery Options** (continued)

Any decision to eliminate decentralized libraries would presume a mandate which did not encompass the requirement to serve external users (e.g., school teachers, students, etc.). It is envisaged that centralization, if implemented, would not be applied universally; the actual degree of centralization, and the respective roles of central and decentralized library staff, would be worked out cooperatively on a location-by-location basis. The guiding principle should be for greater centralized involvement and support in the smaller organizational settings where the number of users may not justify a fully self-sufficient local library.

**Epilogue**

The findings of this study indicate that there is considerable room for improving departmental library services without dramatically increasing costs. The key to preparation of the long-range plan for library services will be establishing a vision for the scope of library services that will be made available to departmental staff in executing their responsibilities. Exemplary organizations are exemplary in all endeavours, and pay special attention to the internal support systems provided to their professional and managerial staff. The potential for library services as an essential support service should not be underestimated.

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# APPENDIX A

# SURVEY INSTRUMENT

**ALBERTA EDUCATION**

**LIBRARY SERVICES QUESTIONNAIRE**

The Deputy Minister, in the attached memo of October 1, announced that Alberta Education has commissioned an evaluation of all its libraries in order to assess their current effectiveness and determine future roles and priorities for the departmental libraries in supporting the information needs of managerial and professional staff. Gathering your perceptions of the benefits of the services currently provided, as well as your needs for information in your day-to-day work, will assist the department in determining the future direction of library resources and services.

This questionnaire has been distributed to each managerial and professional staff member in the department to gather information and opinions from all levels and job functions within Alberta Education. We ask you to take the time to complete the questionnaire as carefully and thoughtfully as possible. Once completed, **the questionnaire should be sealed in the envelope provided and returned to your Director** who will pass it unopened to Deloitte Haskins & Sells Associates for analysis.

**We assure you that the responses will be treated in strict confidence.**

It is our goal to achieve a 100% response rate to the questionnaire so that the results are comprehensive, reliable and valid. A report of findings, conclusions and recommendations will be distributed.

Your Director will be following up to ensure that all questionnaires are completed and returned by Friday, November 15.

We thank you very much for your cooperation.

DELOITTE HASKINS & SELLS ASSOCIATES

Alberta MEMORANDUM

EDUCATION

**FROM:** Reno Bosetti
Deputy Minister of Education

**OUR FILE REFERENCE:**

**YOUR FILE REFERENCE:**

**TO:** Assistant Deputy Ministers
Directors & Responsibility Centre Heads

**DATE:** Oct. 1, 1985

**TELEPHONE:**

**SUBJECT:** **Evaluation of Library Services**

The attached report entitled "Evaluability Assessment of Library Services" represents the completion of **phase one** of the evaluation of library services. It provides a plan of how phases two and three should proceed. The document:

- presents a profile of Alberta Education's library system;
- describes the departmental libraries;
- presents the evaluation issues identified by staff; and
- recommends evaluation options dealing with identified key issues.

Please review the report carefully and share the information with your managerial and professional staff members in preparation for the second phase of the evaluation.

**Phase two,** which consists of an external effectiveness evaluation of library services, is being conducted by Deloitte Haskins & Sells Associates. The approach will consist of surveying all professional and managerial staff within the department as well as interviewing a sample of these staff members. I am asking your cooperation in this endeavor.

The project coordinator, Nelly McEwen, will be sending you a list of the professional and managerial staff members in your division/department. Please verify that the list is accurate and complete since it will serve as the official record of professional/managerial staff to be included in the evaluation. I request your further cooperation in distributing and collecting the questionnaires. We want a high return rate to ensure that the results are valid and represent the collective consideration of the department.

If you have any questions about the evaluation or the suggested procedures, please contact Nelly McEwen at 427-8218. She will contact you directly regarding the staff list.

Reno Bosetti

cc: Nelly McEwen
Attachment

**ALBERTA EDUCATION**

**LIBRARY SERVICES QUESTIONNAIRE**

1. What kind of information do you generally **use in performing your job?** Check all that are appropriate:

**Type:**

___ Curricular
___ Directories
___ Legislative/Legal
___ Professional
___ Statistical
___ Other _____
_____

**Format/Source:**

___ Audiovisual Resources
___ Books/Monographs
___ Computer Courseware/Software
___ Journals/Newsletters
___ Mass Media (radio, newspaper, television)
___ Media Analysis/Clipping Service
___ On-line Information (via computer)
___ Reports/Documents
___ Other _____
_____

2. **Why do you need information?** Using the scale to the right, please indicate in the boxes provided how **important** information is for each of the following activities:

**Degree of Importance**

1 - Very Unimportant
2 - Unimportant
3 - Somewhat Important
4 - Important
5 - Very Important
X - Not Applicable

**Activity:**

| | |
|---|---|
| Handling day-to-day work responsibilities | ☐ |
| Maintaining currency in your field | ☐ |
| Personal interest | ☐ |
| Preparing oral presentations | ☐ |
| Preparing written reports | ☐ |
| Professional development | ☐ |
| Researching assigned topics/projects | ☐ |
| Responding to an Action Request | ☐ |
| Other _____ | ☐ |
| _____ | ☐ |

3. **Where do you get the information you need?** Please indicate how **frequently you personally use** each of the following sources of information:

**Frequency of Use**

1 - Never
2 - Rarely
3 - Sometimes
4 - Often
5 - Always

**Alberta Education Sources:**

- Central Library (Devonian Building) ☐
- Central Records Unit ☐
- Communications Branch ☐
- Computer Systems and Data Base Management ☐
- Corporate Information Systems Section ☐
- Grants Administration Unit ☐
- Provincial School Libraries (ASD/ACS*) ☐
- Regional Office Libraries ☐
- Your Own Branch Collection ☐

* Alberta School for the Deaf/Alberta Correspondence School

**External Library Sources:**

- College/University Libraries ☐
- Other Government Libraries ☐
- Public Libraries ☐

**Other Information Sources:**

- Colleague's Book Collection ☐
- Conferences/Workshops ☐
- Personal Book Collection ☐
- Personal Contacts ☐
- Self-generated Data ☐
- Other _____ ☐
- _____ ☐
- _____ ☐
- _____ ☐

4. Based upon your direct experience with libraries, please indicate in each of the boxes provided below your general assessment of the libraries **you personally use for work-related information:**

Assessment Categories:
1 - Very Poor
2 - Poor
3 - Fair
4 - Good
5 - Very Good
X - Don't Use

| ASSESSMENT FACTORS | DEPARTMENTAL LIBRARIES | | | EXTERNAL LIBRARIES |
|---|---|---|---|---|
| | Central | Regional Office | Provincial School | |
| **Library Location:** | | | | |
| Convenience/Accessibility | ☐ | ☐ | ☐ | ☐ |
| Turnaround Time | ☐ | ☐ | ☐ | ☐ |
| **Library Materials/Resources:** | | | | |
| Currency | ☐ | ☐ | ☐ | ☐ |
| Organization and Layout | ☐ | ☐ | ☐ | ☐ |
| Quality | ☐ | ☐ | ☐ | ☐ |
| Quantity | ☐ | ☐ | ☐ | ☐ |
| Usefulness | ☐ | ☐ | ☐ | ☐ |
| **Library Services:** | | | | |
| Information Retrieval | ☐ | ☐ | ☐ | ☐ |
| Ordering | ☐ | ☐ | ☐ | ☐ |
| Reference | ☐ | ☐ | ☐ | ☐ |
| **Library Staff:** | | | | |
| Availability | ☐ | ☐ | ☐ | ☐ |
| Helpfulness | ☐ | ☐ | ☐ | ☐ |
| Knowledge/Skill | ☐ | ☐ | ☐ | ☐ |

## CHART I - CENTRAL LIBRARY (Devonian Building)

**INSTRUCTIONS:**

Chart I lists the resources and services available to you through the **Central Library** (Devonian Building). Chart II on page 5 lists them for the decentralized libraries.

**If you personally use** the Central Library, please provide your assessment of the resources and services listed below by answering the questions to the right in the boxes provided.

- Questions 5, 6, 7, 8 - Answer for **all** resources/services listed;
- Questions 9, 10 - Answer **only** for the resources/services you **use**.

| | ANSWER FOR ALL RESOURCES/SERVICES LISTED | | | | ANSWER ONLY FOR THE RESOURCES/SERVICES YOU USE | |
|---|---|---|---|---|---|---|
| | Question 5 | Question 6 | Question 7 | Question 8 | Question 9 | Question 10 |
| | **AWARENESS** | **USEFULNESS** | **PRIORITY** | **FREQUENCY OF USE** | **QUALITY** | **TIMELINESS** |
| | Are you **aware** that this particular resource or service is available through the Central Library? | How **useful** and **valuable** is this particular resource or service to you? | What **priority** do you place on maintaining this particular resource or service within the Central Library? | How **frequently** do you use this particular resource or service? | How satisfied are you with the relevance, currency and overall **quality** of the information which is provided through this resource or service? | How satisfied are you with the availability, ease of access and overall **timeliness** of this resource or service? |
| **CENTRAL LIBRARY RESOURCES AND SERVICES** | 1 - Yes<br>2 - No | 1 - Very Low<br>2 - Low<br>3 - Moderate<br>4 - High<br>5 - Very High<br>X - Not Applicable | | 1 - Never<br>2 - Rarely<br>3 - Monthly<br>4 - Weekly<br>5 - Daily | 1 - Very Dissatisfied<br>2 - Dissatisfied<br>3 - Somewhat Satisfied<br>4 - Satisfied<br>5 - Very Satisfied<br>X - Don't Use | |
| **RESOURCES:** | | | | | | |
| **Specialized Collection:** | | | | | | |
| Alberta Education Published Documents | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Legislation | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Selection Aids (publishers' catalogues, databases) | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Professional Collection:** | | | | | | |
| Audiovisual Resources | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Books/Monographs | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Journals/Newspapers/Newsletters | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Reports/Documents | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Curricular Collection:** | | | | | | |
| Authorized Alberta Curricula | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Computer Courseware/Software | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Curricular Resources Being Evaluated | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Curriculum Guides | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Special Education Resources | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Unauthorized Classroom Materials | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Catalogues:** | | | | | | |
| Alberta Education Libraries | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Monthly Acquisitions List | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **External Computer Databases:** | | | | | | |
| Provincial | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| National | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| International | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Bibliographic | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Full Text of Articles | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Statistical | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Audiovisual Equipment** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **SERVICES:** | | | | | | |
| **Current Awareness (e.g., routing service)** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Information Retrieval** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Library Orientation/Inservice** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Ordering (books, journals, etc.)** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Reference** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

## CHART II - DECENTRALIZED LIBRARIES

**INSTRUCTIONS:**

Chart II lists the resources and services available to you through Alberta Education's **Decentralized Libraries** (i.e., Regional Offices or Provincial Schools).

**If you personally use** a decentralized library, please indicate which one you are assessing here:

- ☐ **Regional Office**
- ☐ **Provincial School**

Please provide your assessment of the resources and services listed below by answering the questions to the right in the boxes provided:

- Questions 11, 12, 13, 14 - Answer for **all** resources/services listed.
- Questions 15, 16 - Answer **only** for the resources/services you **use**.

| DECENTRALIZED LIBRARY RESOURCES AND SERVICES | ANSWER FOR ALL RESOURCES/SERVICES LISTED | | | | ANSWER ONLY FOR THE RESOURCES/SERVICES YOU USE | |
|---|---|---|---|---|---|---|
| | Question 11 | Question 12 | Question 13 | Question 14 | Question 15 | Question 16 |
| | **AWARENESS** | **USEFULNESS** | **PRIORITY** | **FREQUENCY OF USE** | **QUALITY** | **TIMELINESS** |
| | Are you **aware** that this particular resource or service is available through your decentralized library? | How **useful** and **valuable** is this particular resource or service to you? | What **priority** do you place on maintaining this particular resource or service within your decentralized library? | How **frequently** do you use this particular resource or service? | How satisfied are you with the relevance, currency and overall **quality** of the information which is provided through this resource or service? | How satisfied are you with the availability, ease of access and overall **timeliness** of this resource or service? |
| | 1 - Yes<br>2 - No | 1 - Very Low<br>2 - Low<br>3 - Moderate<br>4 - High<br>5 - Very High<br>X - Not Applicable | | 1 - Never<br>2 - Rarely<br>3 - Monthly<br>4 - Weekly<br>5 - Daily | 1 - Very Dissatisfied<br>2 - Dissatisfied<br>3 - Somewhat Satisfied<br>4 - Satisfied<br>5 - Very Satisfied<br>X - Don't Use | |
| **RESOURCES:** | | | | | | |
| **Specialized Collection:** | | | | | | |
| Alberta Education Published Documents | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Selection Aids (publishers' catalogues, databases) | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Professional Collection:** | | | | | | |
| Books/Monographs | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Journals/Newspapers/Newsletters | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Reports/Documents | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Curricular Collection:** | | | | | | |
| Authorized Alberta Curricula | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Computer Courseware/Software | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Curriculum Guides | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Special Education Resources | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Unauthorized Classroom Materials | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Catalogues:** | | | | | | |
| Alberta Education Libraries | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| Monthly Acquisitions List | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Audiovisual Equipment** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **SERVICES:** | | | | | | |
| **Current Awareness (e.g., routing service)** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Information Retrieval** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Library Orientation/Inservice** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Ordering (books, journals, etc.)** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Reference** | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

17. To what extent can you attribute the following **benefits** directly to your utilization of any departmental library resources and services?

**Extent of Benefits**

1 - Low
2 - Medium
3 - High

**Benefits:**

| | |
|---|---|
| Access to more comprehensive, relevant and current information | ☐ |
| Enhanced job effectiveness | ☐ |
| More informed decision making | ☐ |
| Personal time savings | ☐ |
| Quicker access to information | ☐ |
| Other _____ | ☐ |
| _____ | ☐ |

18. Please identify and explain specific gaps which you feel exist in the current resources and services provided by the departmental libraries. Please specify which library (Central, Regional Office, Provincial School) you are referring to.

19. If the departmental libraries were to offer the following services, how **useful** would you find them?

**Usefulness**

1 - Very Low
2 - Low
3 - Moderate
4 - High
5 - Very High
X - Not Applicable

**Services:**

Direct electronic communication links between users and library services ☐

Interpreting information for users ☐

Library orientation for new departmental staff ☐

Reformatting bibliographies to meet specific user requirements ☐

Regular scanning and monitoring of publications to notify users of items of interest in their field ☐

Screening and summarizing information for users ☐

On-line access via computer by Regional Office and Provincial School Libraries to:

- Central Library holdings ☐
- External computer databases ☐
- Holdings of other libraries (government, university, etc.) ☐
- Provincial School Library holdings ☐
- Regional Office Library holdings ☐

20. **Whom should Alberta Education's libraries serve?** What **priority** do you place on Alberta Education's libraries serving the following users?

**Priority**

1 - Low
2 - Medium
3 - High

**Users:**

| | |
|---|---|
| ECS Operators | ☐ |
| Edmonton Provincial Office | ☐ |
| Other Departments/Agencies | ☐ |
| Provincial Schools (ASD/ACS) | ☐ |
| Public | ☐ |
| Regional Offices of Education | ☐ |
| School Teachers and Administrators | ☐ |
| University Staff and Students | ☐ |
| Other _____ | ☐ |
| _____ | ☐ |

21. Please make any additional comments you consider pertinent to the evaluation of the departmental libraries.

_____

_____

_____

_____

_____

_____

_____

_____

_____

22. Please provide the following information about yourself by **checking one item** from each of the categories below:

**Division:**

___ Minister/Deputy Minister's Office
___ Finance and Administration
___ Planning and Evaluation
___ Program Delivery
___ Program Development

**Working Title:**

___ Administrative Officer
___ Analyst
___ Assistant
___ Associate/Assistant Director
___ Consultant
___ Director
___ Manager/Coordinator/Supervisor
___ Minister/DM/ADM
___ Research Officer
___ Resource Officer
___ Senior Teacher
___ Teacher
___ Teacher Supervisor
___ Test Development Specialist
___ Other (please specify):

_____

**Years at:**

Current Position _____
Current Location _____

**Branch/Responsibility Centre:**

___ Alberta Correspondence School
___ Alberta School for the Deaf
___ Calgary Regional Office
___ Communications
___ Computer Systems and Data Base Management
___ Curriculum
___ Early Childhood Services
___ Edmonton Regional Office
___ Financial and Administrative Services
___ Grande Prairie Regional Office
___ Language Services
___ Legislative Services
___ Lethbridge Regional Office
___ Media and Technology
___ Native Education Project
___ Personnel Administration
___ Planning Services
___ Red Deer Regional Office
___ School Book
___ School Buildings
___ School Business Administration Services
___ Secondary Education Implementation Project
___ Special Educational Services
___ Student Evaluation
___ Support Programs
___ Teacher Certification and Development

* * *

Thank you very much for your cooperation!

# APPENDIX B

# SURVEY ANALYSIS

**Types Of Information Used By Alberta Education Staff**

**By Function and Location ***

| Type | Senior Management (n = 25) | Middle Management (n = 125) | Professional (n = 100) | Teachers (n = 65) |
|---|---|---|---|---|
| Curricular | 64% | 65% | 45% | 86% |
| Directories | 56 | 40 | 34 | 9 |
| Legislative/Legal | 76 | 42 | 28 | 8 |
| Professional | 88 | 87 | 74 | 76 |
| Statistical | 84 | 45 | 44 | 24 |
| Administrative | 12 | 8 | 5 | 2 |
| Other | 12 | 11 | 12 | 12 |

| Type | Central Office (n = 160) | Regional Offices (n = 55) | Provincial Schools (n = 90) |
|---|---|---|---|
| Curricular | 47% | 80% | 84% |
| Directories | 37 | 41 | 19 |
| Legislative/Legal | 34 | 46 | 17 |
| Professional | 76 | 95 | 78 |
| Statistical | 52 | 41 | 27 |
| Administrative | 8 | 4 | 4 |
| Other | 12 | 9 | 12 |

* Percentage of respondents indicating usage of each information type

**Format/Source Of Information Used By Alberta Education Staff**

**By Function and Location ***

| Format/Source | Senior Management (n = 25) | Middle Management (n = 127) | Professional (n = 100) | Teachers (n = 67) |
|---|---|---|---|---|
| Audiovisual Resources | 16% | 31% | 30% | 31% |
| Books/Monographs | 80 | 82 | 76 | 97 |
| Computer Courseware/Software | 8 | 24 | 31 | 19 |
| Journals/Newsletters | 88 | 86 | 69 | 75 |
| Mass Media | 56 | 27 | 26 | 43 |
| Media Analysis/Clipping Service | 80 | 44 | 27 | 10 |
| Online Information | 36 | 34 | 40 | 10 |
| Reports/Documents | 80 | 80 | 70 | 36 |

| Format/Source | Central Office (n = 161) | Regional Offices (n = 56) | Provincial Schools (n = 94) |
|---|---|---|---|
| Audiovisual Resources | 22% | 41% | 36% |
| Books/Monographs | 76 | 84 | 94 |
| Computer Courseware/Software | 26 | 23 | 22 |
| Journals/Newsletters | 76 | 89 | 77 |
| Mass Media | 24 | 29 | 44 |
| Media Analysis/Clipping Service | 37 | 54 | 16 |
| Online Information | 40 | 21 | 15 |
| Reports/Documents | 78 | 75 | 42 |

* Percentage of respondents indicating usage of each information format/source

**Importance Of Information Used By Alberta Education Staff**

**By Function and Location ***

| Activity | Senior Management (n = 26) | Middle Management (n = 120) | Professional (n = 90) | Teachers (n = 60) |
|---|---|---|---|---|
| Handle Day-to-Day Work | 3.9 | 3.9 | 4.1 | 3.5 |
| Stay Current in Field | 4.1 | 4.3 | 4.1 | 4.0 |
| Personal Interest | 3.0 | 3.3 | 3.5 | 3.3 |
| Prepare Oral Presentations | 3.4 | 3.4 | 3.2 | 3.0 |
| Prepare Written Reports | 3.7 | 3.8 | 3.8 | 3.6 |
| Professional Development | 3.4 | 3.8 | 3.9 | 3.9 |
| Research Assigned Topics | 3.2 | 4.1 | 3.8 | 4.2 |
| Action Request Response | 3.0 | 3.6 | 3.6 | 3.5 |

| Activity | Central Office (n = 150) | Regional Offices (n = 55) | Provincial Schools (n = 90) |
|---|---|---|---|
| Handle Day-to-Day Work | 4.0 | 3.8 | 3.7 |
| Stay Current in Field | 4.2 | 4.2 | 4.1 |
| Personal Interest | 3.3 | 3.3 | 3.4 |
| Prepare Oral Presentations | 3.1 | 3.9 | 3.1 |
| Prepare Written Reports | 3.9 | 3.6 | 3.7 |
| Professional Development | 3.7 | 3.9 | 4.0 |
| Research Assigned Topics | 3.9 | 4.0 | 4.2 |
| Action Request Response | 3.5 | 3.4 | 3.6 |

* Importance: 1 - Very Unimportant; 2 - Unimportant; 3 - Somewhat Important; 4 - Important; 5 - Very Important

**Sources Of Information Used By Alberta Education Staff**

**By Function and Location ***

| Source | Senior Management (n = 25) | Middle Management (n = 125) | Professional (n = 100) | Teachers (n = 60) |
|---|---|---|---|---|
| **Alberta Education Sources** | | | | |
| Central Library | 2.9 | 3.1 | 2.8 | 2.0 |
| Central Records | 2.9 | 2.4 | 2.2 | 1.3 |
| Communications | 2.6 | 2.0 | 1.8 | 1.4 |
| CSDBM | 2.8 | 2.5 | 2.5 | 1.4 |
| CIS | 1.7 | 1.5 | 1.4 | 1.1 |
| Grants Administration | 3.3 | 2.3 | 1.8 | 1.1 |
| Provincial School Library | 1.3 | 1.5 | 1.6 | 4.1 |
| Regional Office Library | 1.6 | 2.5 | 1.8 | 1.8 |
| Branch Books | 3.0 | 3.3 | 3.4 | 3.6 |
| **External Libraries** | | | | |
| College/University | 2.6 | 2.6 | 2.4 | 2.7 |
| Other Government | 1.8 | 1.9 | 1.8 | 1.5 |
| Public | 1.8 | 2.1 | 2.1 | 3.1 |
| **Other Sources** | | | | |
| Colleague's Books | 2.2 | 2.3 | 2.4 | 2.4 |
| Conference/Workshops | 3.3 | 3.1 | 2.7 | 2.9 |
| Own Books | 3.2 | 3.3 | 3.2 | 3.7 |
| Personal Contacts | 3.8 | 3.6 | 3.4 | 3.2 |
| Self-Generated | 3.3 | 3.4 | 3.1 | 2.8 |

| Source | Central Office (n = 160) | Regional Offices (n = 55) | Provincial Schools (n = 90) |
|---|---|---|---|
| **Alberta Education Sources** | | | |
| Central Library | 3.1 | 2.7 | 2.1 |
| Central Records | 2.6 | 1.9 | 1.4 |
| Communications | 1.9 | 2.1 | 1.5 |
| CSDBM | 2.7 | 2.1 | 1.6 |
| CIS | 1.6 | 1.4 | 1.1 |
| Grants Administration | 2.1 | 2.8 | 1.3 |
| Provincial School Library | 1.2 | 1.5 | 3.9 |
| Regional Office Library | 1.7 | 3.6 | 1.8 |
| Branch Books | 3.3 | 3.3 | 3.6 |
| **External Libraries** | | | |
| College/University | 2.4 | 2.4 | 2.8 |
| Other Government | 1.9 | 1.7 | 1.6 |
| Public | 1.9 | 2.2 | 3.0 |
| **Other Sources** | | | |
| Colleague's Books | 2.3 | 2.5 | 2.4 |
| Conference/Workshops | 2.8 | 3.5 | 2.9 |
| Own Books | 3.1 | 3.5 | 3.6 |
| Personal Contacts | 3.4 | 3.9 | 3.3 |
| Self-Generated | 3.2 | 3.5 | 2.8 |

* Frequency of Use: 1 - Never; 2 - Rarely; 3 - Sometimes; 4 - Often; 5 - Always

**Assessment Of Libraries Used By Alberta Education Staff ***

| Assessment Factor | Central Library (n = 230) | Regional Office Libraries (n = 130) | Provincial School Libraries (n = 90) | External Libraries (n = 180) |
|---|---|---|---|---|
| **Location** | | | | |
| Convenience | 4.2 | 3.9 | 4.2 | 3.3 |
| Turnaround | 4.0 | 3.9 | 4.2 | 3.5 |
| **Materials/Resources** | | | | |
| Currency | 4.2 | 3.6 | 3.8 | 4.0 |
| Organization | 3.9 | 3.4 | 3.7 | 3.9 |
| Quality | 4.0 | 3.5 | 3.7 | 4.0 |
| Quantity | 3.8 | 3.2 | 3.3 | 4.0 |
| Usefulness | 3.9 | 3.5 | 3.7 | 3.9 |
| **Services** | | | | |
| Retrieval | 4.2 | 3.7 | 3.9 | 3.8 |
| Ordering | 3.9 | 3.5 | 3.9 | 3.5 |
| Reference | 4.0 | 3.5 | 3.6 | 3.9 |
| **Staff** | | | | |
| Availability | 4.4 | 3.9 | 3.7 | 3.8 |
| Helpfulness | 4.5 | 4.0 | 4.2 | 3.9 |
| Knowledge | 4.3 | 3.8 | 4.0 | 4.0 |

* Assessment: 1 - Very Poor; 2 - Poor; 3 - Fair; 4 - Good; 5 - Very Good

## Awareness Of Library Resources And Services *

| Resources/Services | Central Office (n = 260) | Regional Offices (n = 55) | Provincial Schools (n = 60) |
|---|---|---|---|
| **RESOURCES** | | | |
| **Specialized Collection** | | | |
| Alberta Education Documents | 92% | 91% | 74% |
| Legislation | 84 | - | - |
| Selection Aids | 88 | 86 | 87 |
| **Professional Collection** | | | |
| Audiovisual Resources | 84 | - | - |
| Books/Monographs | 97 | 95 | 100 |
| Journals/Newspapers | 98 | 90 | 100 |
| Reports/Documents | 96 | 91 | 83 |
| **Curricular Collection** | | | |
| Authorized Alberta Curricula | 88 | 93 | 85 |
| Computer Courseware/Software | 55 | 66 | 43 |
| Resources Being Evaluated | 61 | - | - |
| Curriculum Guides | 86 | 92 | 83 |
| Special Education Resources | 78 | 86 | 72 |
| Unauthorized Classroom Materials | 48 | 72 | 53 |
| **Catalogues** | | | |
| Alberta Education Libraries | 82 | 81 | 70 |
| Monthly Acquisitions List | 90 | 84 | 89 |
| **External Computer Databases** | | | |
| Provincial | 75 | - | - |
| National | 68 | - | - |
| International | 60 | - | - |
| Bibliographic | 68 | - | - |
| Full Text of Articles | 64 | - | - |
| Statistical | 61 | - | - |
| **Audiovisual Equipment** | 70 | 82 | 53 |
| **SERVICES** | | | |
| **Current Awareness** | 79 | 73 | 65 |
| **Information Retrieval** | 90 | 78 | 89 |
| **Library Orientation/Inservice** | 76 | 68 | 70 |
| **Ordering** | 89 | 86 | 98 |
| **Reference** | 91 | 88 | 97 |

* Percentage of respondents aware of each resource/service

**Usefulness Of Library Resources And Services ***

| Resources/Services | Central Office (n = 220) | Regional Offices (n = 50) | Provincial Schools (n = 50) |
|---|---|---|---|
| **RESOURCES** | | | |
| **Specialized Collection** | | | |
| Alberta Education Documents | 2.9 | 3.5 | 2.5 |
| Legislation | 2.5 | - | - |
| Selection Aids | 2.6 | 3.0 | 2.9 |
| **Professional Collection** | | | |
| Audiovisual Resources | 2.4 | - | - |
| Books/Monographs | 3.5 | 3.9 | 4.2 |
| Journals/Newspapers | 3.6 | 3.9 | 4.0 |
| Reports/Documents | 3.3 | 3.7 | 3.3 |
| **Curricular Collection** | | | |
| Authorized Alberta Curricula | 2.9 | 4.1 | 3.8 |
| Computer Courseware/Software | 2.3 | 3.3 | 2.6 |
| Resources Being Evaluated | 2.5 | - | - |
| Curriculum Guides | 2.9 | 3.9 | 3.8 |
| Special Education Resources | 2.4 | 3.1 | 2.8 |
| Unauthorized Classroom Materials | 2.1 | 3.1 | 2.7 |
| **Catalogues** | | | |
| Alberta Education Libraries | 2.6 | 3.0 | 2.7 |
| Monthly Acquisitions List | 2.9 | 3.1 | 3.0 |
| **External Computer Databases** | | | |
| Provincial | 2.7 | - | - |
| National | 2.6 | - | - |
| International | 2.5 | - | - |
| Bibliographic | 2.6 | - | - |
| Full Text of Articles | 2.7 | - | - |
| Statistical | 2.4 | - | - |
| **Audiovisual Equipment** | 2.3 | 3.5 | 2.5 |
| **SERVICES** | | | |
| **Current Awareness** | 3.1 | 3.6 | 3.0 |
| **Information Retrieval** | 3.5 | 3.6 | 3.5 |
| **Library Orientation/Inservice** | 2.6 | 2.6 | 2.9 |
| **Ordering** | 3.2 | 3.8 | 3.7 |
| **Reference** | 3.4 | 3.8 | 4.1 |

* Usefulness: 1 - Very Low; 2 - Low; 3 - Moderate; 4 - High; 5 - Very High

**Priority Of Maintaining Library Resources And Services ***

| Resources/Services | Central Office (n = 240) | Regional Offices (n = 50) | Provincial Schools (n = 55) |
|---|---|---|---|
| **RESOURCES** | | | |
| **Specialized Collection** | | | |
| Alberta Education Documents | 3.6 | 3.8 | 2.9 |
| Legislation | 3.4 | - | - |
| Selection Aids | 3.3 | 3.4 | 3.3 |
| **Professional Collection** | | | |
| Audiovisual Resources | 3.0 | - | - |
| Books/Monographs | 3.9 | 4.0 | 4.5 |
| Journals/Newspapers | 3.9 | 4.3 | 4.2 |
| Reports/Documents | 3.8 | 4.1 | 3.8 |
| **Curricular Collection** | | | |
| Authorized Alberta Curricula | 3.7 | 4.3 | 4.1 |
| Computer Courseware/Software | 3.1 | 3.9 | 3.4 |
| Resources Being Evaluated | 3.2 | - | - |
| Curriculum Guides | 3.6 | 4.2 | 4.1 |
| Special Education Resources | 3.3 | 4.0 | 3.4 |
| Unauthorized Classroom Materials | 2.6 | 3.3 | 3.1 |
| **Catalogues** | | | |
| Alberta Education Libraries | 3.3 | 3.5 | 3.3 |
| Monthly Acquisitions List | 3.4 | 3.5 | 3.4 |
| **External Computer Databases** | | | |
| Provincial | 3.3 | - | - |
| National | 3.3 | - | - |
| International | 3.2 | - | - |
| Bibliographic | 3.2 | - | - |
| Full Text of Articles | 3.3 | - | - |
| Statistical | 3.1 | - | - |
| **Audiovisual Equipment** | 2.9 | 3.9 | 2.9 |
| **SERVICES** | | | |
| **Current Awareness** | 3.5 | 3.9 | 3.6 |
| **Information Retrieval** | 3.9 | 4.0 | 4.1 |
| **Library Orientation/Inservice** | 3.1 | 3.1 | 3.3 |
| **Ordering** | 3.6 | 4.1 | 4.2 |
| **Reference** | 3.8 | 4.1 | 4.3 |

* Priority: 1 - Very Low; 2 - Low; 3 - Moderate; 4 - High; 5 - Very High

**Frequency Of Use Of Library Resources And Services ***

| Resources/Services | Central Office (n = 250) | Regional Offices (n = 50) | Provincial Schools (n = 60) |
|---|---|---|---|
| **RESOURCES** | | | |
| **Specialized Collection** | | | |
| Alberta Education Documents | 2.1 | 2.7 | 1.9 |
| Legislation | 1.8 | - | - |
| Selection Aids | 1.9 | 2.1 | 2.1 |
| **Professional Collection** | | | |
| Audiovisual Resources | 1.7 | - | - |
| Books/Monographs | 2.6 | 3.2 | 3.5 |
| Journals/Newspapers | 2.9 | 3.5 | 3.5 |
| Reports/Documents | 2.5 | 3.0 | 2.4 |
| **Curricular Collection** | | | |
| Authorized Alberta Curricula | 2.0 | 3.1 | 2.7 |
| Computer Courseware/Software | 1.5 | 2.1 | 1.8 |
| Resources Being Evaluated | 1.7 | - | - |
| Curriculum Guides | 2.0 | 2.9 | 2.8 |
| Special Education Resources | 1.5 | 2.1 | 2.1 |
| Unauthorized Classroom Materials | 1.4 | 1.9 | 2.1 |
| **Catalogues** | | | |
| Alberta Education Libraries | 1.8 | 2.0 | 2.0 |
| Monthly Acquisitions List | 2.2 | 2.4 | 2.3 |
| **External Computer Databases** | | | |
| Provincial | 1.9 | - | - |
| National | 1.8 | - | - |
| International | 1.7 | - | - |
| Bibliographic | 1.8 | - | - |
| Full Text of Articles | 1.7 | - | - |
| Statistical | 1.6 | - | - |
| **Audiovisual Equipment** | 1.6 | 2.4 | 2.1 |
| **SERVICES** | | | |
| **Current Awareness** | 2.4 | 2.6 | 2.1 |
| **Information Retrieval** | 2.4 | 2.5 | 2.5 |
| **Library Orientation/Inservice** | 1.6 | 1.7 | 1.8 |
| **Ordering** | 2.1 | 2.6 | 2.4 |
| **Reference** | 2.4 | 2.6 | 3.2 |

* Frequency of Use: 1 - Never; 2 - Rarely; 3 - Monthly; 4 - Weekly; 5 - Daily

**Satisfaction With Library Resources And Services ***

| Resources/Services | Central Office (n = 220) | Regional Offices (n = 50) | Provincial Schools (n = 50) |
|---|---|---|---|
| **RESOURCES** | | | |
| **Specialized Collection** | | | |
| Alberta Education Documents | 4.0 | 4.0 | 3.7 |
| Legislation | 3.9 | - | - |
| Selection Aids | 3.9 | 3.7 | 3.8 |
| **Professional Collection** | | | |
| Audiovisual Resources | 3.8 | - | - |
| Books/Monographs | 4.0 | 3.8 | 3.6 |
| Journals/Newspapers | 4.1 | 3.9 | 3.8 |
| Reports/Documents | 4.0 | 3.9 | 3.6 |
| **Curricular Collection** | | | |
| Authorized Alberta Curricula | 4.0 | 4.0 | 3.9 |
| Computer Courseware/Software | 3.8 | 3.5 | 3.0 |
| Resources Being Evaluated | 3.9 | - | - |
| Curriculum Guides | 4.0 | 4.1 | 3.9 |
| Special Education Resources | 3.9 | 3.8 | 3.5 |
| Unauthorized Classroom Materials | 3.8 | 3.7 | 3.5 |
| **Catalogues** | | | |
| Alberta Education Libraries | 3.8 | 3.8 | 3.6 |
| Monthly Acquisitions List | 4.0 | 3.8 | 3.7 |
| **External Computer Databases** | | | |
| Provincial | 4.0 | - | - |
| National | 3.9 | - | - |
| International | 3.9 | - | - |
| Bibliographic | 3.9 | - | - |
| Full Text of Articles | 4.0 | - | - |
| Statistical | 3.9 | - | - |
| **Audiovisual Equipment** | 3.8 | 3.9 | 3.6 |
| **SERVICES** | | | |
| **Current Awareness** | 4.0 | 3.8 | 3.5 |
| **Information Retrieval** | 4.1 | 3.7 | 3.8 |
| **Library Orientation/Inservice** | 4.0 | 3.5 | 3.4 |
| **Ordering** | 4.0 | 3.7 | 3.7 |
| **Reference** | 4.1 | 3.7 | 3.8 |

* Satisfaction: 1 - Very Dissatisfied; 2 - Dissatisfied; 3 - Somewhat Satisfied; 4 - Satisfied; 5 - Very Satisfied

**Benefits of Library Use**

**By Function and Location ***

| Benefit | Senior Management (n = 26) | Middle Management (n = 122) | Professional (n = 85) | Teachers (n = 65) |
|---|---|---|---|---|
| Access to Better Information | 2.3 | 2.4 | 2.4 | 2.5 |
| Enhanced Effectiveness | 1.9 | 2.2 | 2.0 | 2.4 |
| Informed Decision Making | 2.0 | 2.2 | 2.0 | 2.1 |
| Time Savings | 2.0 | 2.2 | 2.0 | 2.1 |
| Quicker Access to Information | 2.2 | 2.3 | 2.2 | 2.3 |

| Benefit | Central Office (n = 144) | Regional Offices (n = 55) | Provincial Schools (n = 90) |
|---|---|---|---|
| Access to Better Information | 2.4 | 2.4 | 2.5 |
| Enhanced Effectiveness | 2.0 | 2.2 | 2.4 |
| Informed Decision Making | 2.1 | 2.3 | 2.1 |
| Time Savings | 2.1 | 2.2 | 2.1 |
| Quicker Access to Information | 2.3 | 2.3 | 2.3 |

* Benefit: 1 - Low; 2 - Medium; 3 - High

**Gaps In Library Resources And Services**

**By Function and Location ***

| Gap | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Disorganization of Resources | 2 | 8 | 2 | 5 |
| Staffing Inadequacies | 4 | 9 | 11 | 13 |
| Duplication of Resources | 1 | 1 | 0 | 0 |
| Lack of Services | 1 | 7 | 4 | 1 |
| Lack of Materials | 2 | 11 | 17 | 9 |
| Other | 3 | 9 | 4 | 10 |
| Total | 13 | 45 | 38 | 38 |

| Gap | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| Disorganization of Resources | 3 | 6 | 7 |
| Staffing Inadequacies | 10 | 9 | 19 |
| Duplication of Resources | 2 | 0 | 0 |
| Lack of Services | 8 | 4 | 1 |
| Lack of Materials | 17 | 6 | 18 |
| Other | 9 | 6 | 10 |
| Total | 49 | 31 | 55 |

* Frequency of response for each gap mentioned

**Usefulness Of Potential New Services**

**By Function and Location ***

| Potential New Service | Senior Management (n = 25) | Middle Management (n = 120) | Professional (n = 85) | Teachers (n = 60) |
|---|---|---|---|---|
| Direct Electronic Links to Users | 2.7 | 3.1 | 3.3 | 3.2 |
| Interpreting Information For Users | 2.2 | 3.0 | 3.0 | 3.0 |
| Library Orientation for New Staff | 3.3 | 3.4 | 3.6 | 3.4 |
| Reformatting Bibliographies | 2.7 | 3.0 | 3.0 | 2.9 |
| Regular Scanning/Monitoring of Publications | 3.6 | 4.0 | 3.9 | 3.8 |
| Screening/Summarizing Information | 3.4 | 3.7 | 3.3 | 3.6 |
| Online Access to: | | | | |
| Central Library Holdings | 2.9 | 3.2 | 3.3 | 3.7 |
| External Computer Databases | 3.1 | 3.2 | 3.2 | 3.5 |
| Holdings of Other Libraries | 3.3 | 3.3 | 3.7 | 3.7 |
| Provincial School Library Holdings | 2.1 | 2.6 | 3.0 | 3.4 |
| Regional Office Library Holdings | 2.2 | 3.0 | 3.2 | 3.4 |

| Potential New Service | Central Office (n = 145) | Regional Offices (n = 55) | Provincial Schools (n = 90) |
|---|---|---|---|
| Direct Electronic Links to Users | 3.0 | 3.5 | 3.3 |
| Interpreting Information For Users | 2.7 | 3.2 | 3.1 |
| Library Orientation for New Staff | 3.6 | 3.2 | 3.5 |
| Reformatting Bibliographies | 2.9 | 3.1 | 2.9 |
| Regular Scanning/Monitoring of Publications | 3.8 | 4.1 | 3.9 |
| Screening/Summarizing Information | 3.4 | 3.9 | 3.6 |
| Online Access to: | | | |
| Central Library Holdings | 3.0 | 3.4 | 3.7 |
| External Computer Databases | 3.1 | 3.4 | 3.4 |
| Holdings of Other Libraries | 3.4 | 3.4 | 3.8 |
| Provincial School Library Holdings | 2.5 | 2.9 | 3.5 |
| Regional Office Library Holdings | 2.8 | 3.4 | 3.4 |

* Usefulness: 1 - Very Low; 2 - Low; 3 - Moderate; 4 - High; 5 - Very High

**Priority Of Serving Alberta Education Library Users**

**By Function and Location ***

| User | Senior Management (n = 25) | Middle Management (n = 120) | Professional (n = 90) | Teachers (n = 60) |
|---|---|---|---|---|
| ECS Operators | 1.6 | 1.9 | 2.2 | 2.1 |
| Edmonton Provincial Office | 2.7 | 2.7 | 2.6 | 2.2 |
| Other Departments/Agencies | 1.7 | 2.0 | 1.9 | 2.1 |
| Provincial Schools | 2.2 | 2.3 | 2.5 | 2.9 |
| Public | 1.2 | 1.5 | 1.5 | 1.9 |
| Regional Offices of Education | 2.8 | 2.8 | 2.7 | 2.5 |
| School Teachers and Administrators | 1.5 | 2.1 | 2.3 | 2.6 |
| University Staff and Students | 1.2 | 1.7 | 1.9 | 2.1 |

| User | Central Office (n = 150) | Regional Offices (n = 55) | Provincial Schools (n = 80) |
|---|---|---|---|
| ECS Operators | 1.9 | 2.0 | 2.1 |
| Edmonton Provincial Office | 2.6 | 2.7 | 2.3 |
| Other Departments/Agencies | 1.9 | 1.9 | 2.1 |
| Provincial Schools | 2.4 | 2.1 | 2.9 |
| Public | 1.4 | 1.5 | 1.9 |
| Regional Offices of Education | 2.7 | 2.9 | 2.5 |
| School Teachers and Administrators | 2.1 | 2.2 | 2.6 |
| University Staff and Students | 1.6 | 1.7 | 2.2 |

* Priority: 1 - Low; 2 - Medium; 3 - High

**Comments Regarding Alberta Education Library Services**

**By Function and Location ***

| Comment | Senior Management | Middle Management | Professional | Teachers |
|---|---|---|---|---|
| Satisfactory | 3 | 4 | 5 | 0 |
| Staffing/Turnaround | 0 | 7 | 2 | 0 |
| Duplication | 2 | 1 | 1 | 0 |
| Resources/Services | 1 | 7 | 4 | 2 |
| Department Focus/Planning | 6 | 7 | 1 | 2 |
| Other | 0 | 6 | 9 | 2 |
| Total | 12 | 32 | 22 | 6 |

| Comment | Central Office | Regional Offices | Provincial Schools |
|---|---|---|---|
| Satisfactory | 8 | 3 | 0 |
| Staffing/Turnaround | 6 | 3 | 0 |
| Duplication | 4 | 0 | 0 |
| Resources/Services | 8 | 3 | 3 |
| Department Focus/Planning | 8 | 4 | 3 |
| Other | 9 | 3 | 4 |
| Total | 43 | 16 | 10 |

* Frequency of response for each comment made

**Edmonton Regional Office Staff**

**Utilization of and Satisfaction With Local**

**and Central Library Components**

| Component | Utilization * | | Satisfaction ** | |
|---|---|---|---|---|
| | Local Library | Central Library | Local Library | Central Library |
| **Resources** | | | | |
| Special Collections | 2.2 | 2.1 | 3.8 | 3.8 |
| Professional Collection | 2.8 | 2.6 | 3.9 | 3.9 |
| Curricular Collection | 2.2 | 2.1 | 3.7 | 3.8 |
| Catalogues | 2.1 | 2.0 | 3.6 | 4.0 |
| Audiovisual Resources | 2.5 | 1.8 | 4.0 | 3.8 |
| **Services** | | | | |
| Current Awareness | 2.5 | 2.6 | 3.6 | 3.9 |
| Information Retrieval | 2.7 | 2.6 | 3.7 | 3.9 |
| Orientation/Inservice | 1.7 | 1.7 | 3.5 | 3.8 |
| Ordering | 2.5 | 2.3 | 3.7 | 3.9 |
| Reference | 2.8 | 2.1 | 3.8 | 4.0 |

* Utilization Scale: 1 - Never; 2 - Rarely; 3 - Monthly

** Satisfaction Scale: 3 - Somewhat Satisfied; 4 - Satisfied

Edmonton Regional Office staff appear to use the central library almost as frequently as their own, except for the reference service and audiovisual resources which are derived more frequently from their local library. Staff appear to be somewhat more satisfied with central library components, particularly with the various services provided.

## APPENDIX C

## EXTERNAL LIBRARY INTERVIEWS

- Amoco Research Centre
- Booz-Allen & Hamilton
- Home Oil Technical Information Services
- Manitoba Education Library
- Saskatchewan Education Resource Centre
- Ontario Education Information Centre
- University of Alberta, Herbert T. Coutts Library

## AMOCO RESEARCH CENTRE: CHICAGO

**Interviewed:** Ms. Camille Stryk, Librarian

### Corporate Mission

The corporate mission of the Amoco Research Centre Library is to collect, store and disseminate information in a timely and cost effective fashion. The library serves the Research Centre in Chicago and the Amoco Corporation in general. There are three different user groups in several different buildings; subjects range from petrochemicals and plastics to biotechnology, with an emphasis on applied research.

### Budget and Costs

Approximately $450,000 is spent annually on library services. The budget includes access to external sources of information such as materials, online searches, etc. Library services are charged back to users to cover a portion of these costs.

### Staff

Library staff are selected for information management skills, while search services staff and subject specialists are specialty-trained and then trained in information retrieval. Staff comprise the following personnel:

- Library: 4 professional librarians, 6 support staff
- Search Services: 10 subject specialists (PhD level)

### Clients

1,700 clients are served in total. Of these, 700 are professional scientists or administrators.

## AMOCO RESEARCH CENTRE: CHICAGO

### Sites

The Research Centre consists of several different buildings housing three subsidiary companies and a headquarters operation. One library site extends services exclusively to the Centre and on a lower priority basis to Amoco worldwide.

### Collection

The library collection consists of monographs, journals, research reports and laboratory notebooks. 60% of the materials budget is spent on serial publications.

### Automation:

- **Serials** - are managed with DTI Datatrek software on an IBM AT/PC network. Titles, history, subscriptions and site locations are maintained on file. There is no cardex.

- **Cataloguing** - utilizes the INQUIRE database management system on mainframe allowing access to an online catalogue of books, laboratory notebooks, papers and internal files in a non-standard record format.

- **Circulation** - a module will be added to INQUIRE in the near future.

- **Online Searching** - is a popular service. The search group has 10 professionals.

### Services

The library offers the following services:

## AMOCO RESEARCH CENTRE: CHICAGO

**Services** (continued)

- standard services such as SDI, routing of journals, permanent loan desk copies, ILL, photocopies, etc.;
- patent searches;
- reference questions, 30 minutes or less (longer questions are referred to Search Services);
- translation services that are contracted out;
- laboratory notebooks through a controlled circulation, eg. microfilm, abstract, index;
- papers for publication (i.e., proprietary or not);
- organized internal information, eg. research reports;
- the service of searchers who are sometimes seconded to research projects or would like to do additional work on a project;
- anticipatory bibliographies where "products" include citations and analysis.

**Records Management**

The library initiated a records management project to centralize the files of each corporation. Librarians are working with data processing in the design and implementation of the system. Documents will be self-indexed by users and the library will maintain a thesaurus to control keywords and a hard copy on microfilm. Electronic documents from office systems and records related to research will be stored in electronic form.

## AMOCO RESEARCH CENTRE: CHICAGO

### Future Role

Over the next five years, the library focus will be on "value added services". Technology will change the procedures for information collection and retrieval, not the purpose. The Search Group will become more directly involved in research projects and the project budgets will reflect the cost for search services.

## BOOZ-ALLEN & HAMILTON: NEW YORK

**Interviewed:** Ms. Ellen Miller, Librarian

### Corporate Mission

The corporate mission of the Booz-Allen & Hamilton library is "to provide value added, cost effective information services", with the emphasis on value added services. The New York library serves Headquarters and the Eastern Region and provides backup for the Western Region and 15 international offices.

### Budget and Costs

| | |
|---|---|
| Staff and materials (approximately 75%/25%) | $500,000 |
| Staff training (external) | 5,000 |
| Staff training (internal) | 6,000 |

### Staff

Since 1985, the library staff has increased by four positions. Current staff include:

- Quick Reference:
  - 2 professional librarians
  - 2 paraprofessionals
  - 2 clerks
- Information Centre: 1 professional, 1 paraprofessional
- Research Group: 6 professional librarians

Staff are selected primarily for information services skills; research group personnel are also selected for their expertise in a given subject area. The belief is that it is easier for a trained librarian to gain a working knowledge of Booz-Allen's business than vice versa; thus training for professional staff is aimed at increasing subject and business expertise.

## BOOZ-ALLEN & HAMILTON: NEW YORK

### Clients

There are 250 professional consultants or researchers in the offices of Booz-Allen & Hamilton, Eastern Region and Headquarters; these and an additional 250 subcontractors and other office personnel comprise the library clientele.

Users are rather homogeneous in that most are conducting business oriented research, ie., marketing, specific products, financial and economic forecasting.

### Sites

A single site serves the library clientele. Other offices with libraries operate independently.

### Collection

The library collection is very narrowly focused; thus, the heavy reliance on interlibrary loan and the purchase of project-specific materials from project budgets. Most Booz-Allen offices are conveniently located near major university and public libraries. Current resources include:

| | |
|---|---|
| Monographs | 2,000 volumes |
| Serials | 350 titles |
| Annual Reports | 3,000 volumes |

### Automation

Library automation has proceeded slowly. Since 1983, the library has used INMAGIC on IBM PC compatibles for cataloguing, and has contemplated the addition of serials and acquisitions. INMAGIC is used to publish the Book Catalogue. A Compaq 286 with DTI Datatrek software is used for

## BOOZ-ALLEN & HAMILTON: NEW YORK

**Automation** (continued)

records management functions. The approach to records management appears ad hoc and pragmatic.

Online search using microcomputers costs $300,000/year.

The corporation is installing an IBM based Local Area Network (LAN). Library micros may be linked to the system which will allow end users to conduct their own reference work.

**Services**

Library services include:

- standard reference services, eg. SDI, book catalogue, contents pages, etc;
- an Information Centre that provides records management support for research projects and collects and manages all correspondence and materials associated with each research project;
- ILL and project charge back services;
- research for project consultants. The research group performs online and offline searches. Time and costs are charged to the project budget, ie., the end user pays as part of contract costs;
- the purchase of materials for projects;
- proactive services (most research is project driven);
- original online searches;

## BOOZ-ALLEN & HAMILTON: NEW YORK

**Services** (continued)

. bibliographies which are retained on file over time.

The library tried training consultants/analysts to perform online searching. Initially, enthusiasm was high; within three months consultants were asking librarians to perform searches. Within nine months no end users were searching online.

**Records Management**

Records management includes any records and correspondence that are related to a research project or contract job. Records management is the responsibility of the Information Centre. Compaq and Datatrek software is used.

The Information Centre is not involved in general records management for the company. General records for personnel, skills inventory, contracts, etc. are stored on the corporate mainframe.

**Future Role**

There is a growing tendency for professional information staff to work with project teams where particular staff specialize or have permanent responsibility for liaison and development in particular subject areas. Staff are playing a more analytical role using spreadsheet software to manipulate financial and statistical information for clients.

## HOME OIL TECHNICAL INFORMATION SERVICES: CALGARY

**Interviewed:** Ms. Rodney Muir, Librarian

### Corporate Mission

The corporate mission of Home Oil Technical Information Services is to organize and distribute corporate information in a cost beneficial manner. Technical Information Services includes a Library (Technology Information Centre), a microfilm section, records management and a computer group which manages text databases.

### Budget and Costs

Library costs are not charged back to the users.

### Staff

The librarian noted there is virtually no need for clerical staff due to the high degree of computerization, however, three clerical staff are available to the Information Centre for retrospective text database creation. Current staff include:

- Library: 1 professional librarian and 2 technicians
- Microfilming: 1 supervisor/technician, 4 technical assistants
- Records Management: 1 engineering technician, 3 assistants (well log production records, etc.)
- Text Database Group: 1 professional librarian, 2 application analysts (for database management system design)

### Clients

The client base includes virtually the entire organization due to the broad scope of library operations. Only financial records (85% of all records) are outside the scope of the library. The Information Centre is

## HOME OIL TECHNICAL INFORMATION SERVICES: CALGARY

**Clients** (continued)

involved with 750 headquarters staff, 400 field staff and 300 staff in international operations (United States and Australia).

**Sites**

The Information Centre is the main site. There is a small library in Australia that was set up by the Calgary office; however it operates independently. There may be another independent library located in Denver (Ms. Muir was not sure).

**Collection**

Current resources include:

| | |
|---|---|
| Monographs | 7,000 volumes |
| Serials | 400 titles |
| INQUIRE database | 785,000 records |
| Microfilm database (well logs, production logs, etc.) | |

**Automation**

The library is fully automated using a database management system called INQUIRE which runs on the corporate AMDAHL mainframe. All functions, (acquisitions, circulation, serials and online catalogue) have been automated during the last five years. The system is not MARC based.

Microfilm retrieval is automated using a Kodak IMT automated roll film display and retrieval system. The indexes are in INQUIRE and the IMT displays microfilm text on a CRT once the search has been performed.

The library works in partnership with the data processing group in designing information systems for the company. While the library designs

## HOME OIL TECHNICAL INFORMATION SERVICES: CALGARY

**Automation** (continued)

the databases, data processing provides technical support and computer hardware. The groups make joint recommendations to management.

The library also contributes design expertise to other areas using INQUIRE. They are currently working towards the implementation of a full text database for the Legal Department using the Wang office automation system interfaced to INQUIRE.

The library's online systems are only available in the Information Centre using security access. They are working towards more general availability while maintaining the security access system.

The library also uses an internal electronic mail system (Prime minicomputer) to receive requests and deliver information. ENVOY 100 and PhotoFax are used for external electronic mail.

It is difficult to give the flavour of such an extensive automation network in such a brief summary. The network is enthusiastically accepted by both staff, clients and management at Home Oil.

**Services**

Library services include:

- online searches using the IBM PC;
- a full range of SDI services which include current contents, xerox articles, etc;
- reference service and bibliographies;

## HOME OIL TECHNICAL INFORMATION SERVICES: CALGARY

**Services** (continued)

- proactive services (eg., delivery of a news service that is updated on a daily basis);
- the distribution of a newsletter, pathfinders and bibliographies;
- archival records retrieval from a fully automated warehouse (one hour response time);
- database design for INQUIRE users;
- occasional participation in research projects by professional librarians.

**Records Management**

Records management comprises a mixture of automated microfilm retrieval, computerized indexes on INQUIRE and an automated warehouse for paper files. The Records Management group reports to Technical Information Services.

**Future Role**

No change is foreseen for the immediate future. The past five years have been a developmental phase and have included the automation of all corporate information sources with index-level records. They feel a need for a period of consolidation. The library staff see technology as a tool to improve service delivery, not to change the service needed or delivered.

## MANITOBA EDUCATION LIBRARY: WINNIPEG

**Interviewed:** Mr. John Tooth, MLS, Director, Instructional Resources Branch

### Corporate Mission

The corporate mission of the Manitoba Education Library is primarily to serve the informational needs of the Department, Administration and Research, and secondarily, to serve trustees, administrators and teachers actively engaged in education. The library also strives to serve students enrolled in teacher education studies and to serve members of the public on a walk-in basis. In general, library service has high visibility and priority.

### Budget and Costs

| | | |
|---|---|---|
| Salaries | | $939,000 |
| Operations: | | |
| WATTS lines | $ 22,000 | |
| Film distribution | 75,000 | |
| Printing | 31,000 | |
| Equipment | 40,000 | |
| Computer maintenance | 15,000 | |
| Serials | 20,000 | |
| Small audiovisual | 10,000 | |
| Books | 30,000 | |
| 16 mm films | 140,000 | |
| Miscellaneous | 17,000 | 400,000 |
| Video | | 55,000 |
| Multicultural collections | | 45,000 |

The first 700 to 800 online searches for teachers are free. Search costs are approximately $5.00 per session.

## MANITOBA EDUCATION LIBRARY: WINNIPEG

### Staff

Professional staff are selected for their library expertise rather than their subject skills although relevant subject or work experience is certainly valued. Current staff include:

- Library: 3 professional, 5 technician, 15 clerical
- Multicultural: 2 professional, 1 technician
- Film distribution: 1 professional, 12 clerical

### Clients

The library supports the following clients:

| | |
|---|---|
| . Departmental staff, administration, planning research | 400 |
| . Teachers (K-12) | 6,000 |
| . Students and Faculty of Education | 400 |
| . Other (eg., social workers, health education, language school, etc.) | 500 |

### Sites

The library is essentially a single-site operation with services delivered through three major units: Education Library, Collection Development Branch and Multi-Cultural Library Services. The very large film distribution service, which is atypical in Canada, is embedded in the Education Library. The branch does not encourage libraries in regional offices; however, there is a regional library in Dauphin for which the central library purchases materials. The Dauphin library does not have a catalogue, and staff allocation is 10% of a consultant. The branch has close ties to the Educational Technology Library, the Special Materials Services (braille, large print production and distribution), and the Education Library, University of Manitoba.

## MANITOBA EDUCATION LIBRARY: WINNIPEG

### Collection

The main library has the following resources:

- a school library collection which is exemplary rather than definitive;
- professional materials for teacher/practitioner support;
- educational research that is provincial, national, and international in nature;
- departmental materials, owing to the library's responsibility for assigning ISBN to all departmental publications for control and collection purposes. The library sends copies to ERIC and Micromedia and keeps circulation and reference copies.

| | |
|---|---|
| Monographs | 65,000 titles; 80,000 volumes |
| Serials | 940 titles |

Acquisitions include approximately 5,000 titles (10,000 volumes) annually, excluding the 16 mm film distribution service and the multicultural library.

The collection is focused to serve the user population. The Director sees the collection as adequate, but would like to enhance it; for example, they would like to have a "demonstration school collection".

### Automation

A long-term plan was developed in 1981. A cost-benefit analysis based on the automation of the manual film service saved four staff salaries. These savings contributed to automation of other library services which could not be justified on their own. Other automation was justified as a future cost-avoidance measure. In 1984 they purchased a Datapoint-based Easy Data system which is now inadequate. Since then, they have

## MANITOBA EDUCATION LIBRARY: WINNIPEG

**Automation** (continued)

implemented an IBM PC-based local area network with the same software. If approved, this will be expanded to a 12 IBM PC network. The library is currently doing reconversion in batch mode using MARCIVE to obtain MARC records and planning to add serials, circulation and public-use catalogue inquiry within the IBM PC environment.

Online searching is performed using dumb terminals. They do not consider downloading of search results a priority since repeat demand is not great, and most online searches are for new materials or sources.

**Services**

The library provides technical support, purchasing, cataloguing, etc. for all three libraries and the film service. Cataloguing is MARC based.

The standard mix of services includes:

- quick reference (less than 20 minutes)
- SDI for serials contents
- online searches
- new acquisitions list

Approximately 30,000 reference questions are handled annually. Of these 4,000 are quick reference.

Bibliographies are both on demand and anticipatory. They are created to keep up with trends and key issues (eg. AIDS) by pre-collecting or pre-selecting certain topics.

## MANITOBA EDUCATION LIBRARY: WINNIPEG

### Records Management

Corporate records are handled by the Administration Branch of the department. The library works with Manitoba Archives to obtain reports and copies. Although the Director does not see records management as a library responsibility, some materials are duplicated in the Library and the Archives based on perceived service needs.

### Future Role

The role of the library will remain essentially the same. Although new technology will change the means of service delivery and improve the services, it will not change the role or objectives of the library.

### Interesting Project

In 1986, St. Vital School in Winnipeg will acquire the Easy Data/Sydney IBM PC software used by the Department of Education and will download catalogue records from the Department of Education to the school catalogue. If this is successful, the experiment may be extended to other schools.

## SASKATCHEWAN EDUCATION RESOURCE CENTRE: REGINA

**Interviewed:** Ms. Jane Naisbit, MLS, Librarian; Ms. Rebecca Landau, MLS

### Corporate Mission

The corporate mission of the Saskatchewan Education Library is to serve the informational needs of the Department of Education staff, Regional Offices, Directors and Superintendents of Education, and special client groups, such as the Schools for the Deaf and Visually Impaired, the Northern Education Unit and the Correspondence School. As a rule, the library does not serve teachers or the public except on a low priority walk-in basis. The library has a relatively low profile within the organization.

### Budget and Costs

| | | |
|---|---|---|
| Salaries* | | $100,000 |
| Materials* | | |
| Serials | $9,000 | |
| Books | 4,500 | |
| Contracts/leases | 5,000 | |
| Miscellaneous | 6,500 | 25,000 |
| Online searches (first year) ** | | 4,500 |

* Other libraries served have separate budgets.

** Previously done through Saskatchewan Provincial Library which did searches for all government departments.

### Staff

Staff are selected for their library expertise; for example, Ms. Landau has experience with McKinsey corporate libraries and Ms. Naisbit has experience with IBM and the National Library of Canada. Current staff comprise two professional librarians, two technicians and one clerical position.

## SASKATCHEWAN EDUCATION RESOURCE CENTRE: REGINA

### Clients

For direct library services, clients include:

- Department staff; regional offices (8) 200
- Directors and superintendents 100 +
- Visually impaired students and teachers 100 +

Technical service support is provided to:

- School for the Deaf
- Correspondence School
- Northern Education Unit
- Community Education Research (Native Education)
- Regional office subcollections (8)

### Sites

Branch libraries are located in those areas listed above under technical service support. The situation is very reminiscent of that pertaining to Alberta in 1981.

Branch libraries are not organized or maintained by the central library. Purchased materials are supplemented by books donated by publishers which have been collected by the curriculum coordinators. The librarian has the desire to serve regional patrons better, but does not have the time to properly organize branch collections.

Not all collections in the Curriculum Development Division are organized through the library. This is particularly true of the Official Minority Language Office collection which remains independent.

## SASKATCHEWAN EDUCATION RESOURCE CENTRE: REGINA

### Collection

Library resources include the following:

| | |
|---|---|
| Professional collection | 10,000 volumes |
| Special materials | 3,000 volumes |
| Serials | 150 titles |

The scope of the collection is typical, although smaller than Manitoba or Alberta. It includes curriculum development materials, tests, reports, textbooks, reference materials, publishers' catalogues, selection aids, and an archival collection of departmental reports.

### Automation

Due to the small size of the operation (eg., last year 700 titles were catalogued and 12,000 volumes circulated), the library has not been automated. Online searches were performed at no charge by professional searchers at the Saskatchewan Provincial Library. The library is currently experimenting with a software package called Dataease in an attempt to automate circulation on a Wang microcomputer.

### Services

The library offers a typical range of services. Additionally, they offer an interesting SDI service consisting of a journal table of contents which is circulated to all eligible clients with title pages tailored to each individual. This is definitely a proactive service with respect to bibliographies and material selection.

### Records Management

The library is not involved in records management. At present there is no centralized records system in the department.

## SASKATCHEWAN EDUCATION RESOURCE CENTRE: REGINA

### Future Role

The library's role is not expected to change. Library staff anticipate that changing technology will enhance the ability to deliver more and better services. They would like to see professional expertise used in the library to organize all curriculum support information services. To accomplish this, however, additional funding would be required.

An internal evaluation of the Instructional Resource Centre was done in 1983/84, although the document was unavailable.

## ONTARIO EDUCATION INFORMATION CENTRE: TORONTO

**Interviewed:** Ms. Patricia Grenier, Manager, Information Centre

### Corporate Mission

The corporate mission of the Ontario Department of Education Information Centre is to provide extensive information and reference services to the Ministry's staff, to be aware of issues and trends of relevance to the Ministry of Education, Ministry of Colleges and Universities and the Skills Development Program, and to provide collections and materials to support information and reference activities. The library focuses primarily on ministry staff and in particular, the Minister's office. No service is offered to any outside groups with the exception of standard referral services, (eg., ILL or walk-in). The library is included in the Research and Information Branch. The library and the Data Processing and Information Systems Branch report to the same Assistant Deputy Minister.

### Budget and Costs

| | | |
|---|---|---|
| Staff salaries | $493,000 | |
| Materials | 85,000 | |
| Searching (online) and SDI | 13,000 | |
| Cataloguing (UTLAS) | 30,000 | |
| Microcomputers and software | 20,000 | |
| Photocopying/current awareness products | 40,000 | |
| Professional development | 6,000 | |
| Newsclipping (McLean Hunter and in-house service) | 9,000 | |
| Office supplies | 26,000 | |
| Department word processing | 2,000 | |
| ILL charges | 2,100 | |
| Miscellaneous | 61,300 | $787,400 |

## ONTARIO EDUCATION INFORMATION CENTRE: TORONTO

### Staff

Current staff comprise the following:

- Information Services:
  - 6 professional librarians (MLS)
  - 1 technician
  - 3 clerks
  - 1 word processing operator

- Current Awareness:
  - 2 professionals (BA)

- Technical Services:
  - 4 professional librarians (including cataloguer and systems librarian)
  - 1 clerk
  - 4 technicians

### Clients

The library serves approximately 1,500 clients, including the Ministries (i.e., Education, Colleges and Universities), and the Skills Development Program. No other education clients served.

### Collection

Library resources include the following:

| | |
|---|---|
| . Books | 28,000 volumes |
| . Serials | 1,000 titles |
| . Audiovisual | None |
| . Microforms (ERIC, ONTERIS, newsclippings) | 28,000 items |

The textbook collection is maintained elsewhere in the department.

## ONTARIO EDUCATION INFORMATION CENTRE: TORONTO

### Services

| | |
|---|---|
| Quick reference (< 15 minutes) | 1,600 in 1984/85 |
| In-Depth (< 60 minutes) | 360 |
| Research (> 60 minutes) | 96 |
| Special Projects | 14 |
| Computer Searches | 420 |
| Newsclipping searches | 130 |
| Computer SDI profiles (14) | 166 bibliographies |
| Manual SDI | 136 bibliographies |

Services provided by the Information Centre include:

- research and special projects which involve compiling extensive bibliographies and working for staff and legislative commissions, committees, etc. Occasionally staff are seconded to these projects.

- analysis of bibliographies and delivery of materials. Information staff try to anticipate user needs (eg., putting a new commission on the newsclipping list and then offering further services);

- current awareness service comprising:
  - daily morning Toronto papers (140 copies distributed and some shared)
  - daily afternoon Ontario and Canadian papers (103 copies are distributed). Clippings are subdivided by subject and by province appropriate for elementary, secondary and post-secondary school issues. Each has a 2-5 page covering letter which summarizes the contents.
  - university and college newsletter. One newsletter is distributed every two weeks.

- serials and title page contents (106 issues are distributed). Generally each issue is shared by 6-7 people.

## ONTARIO EDUCATION INFORMATION CENTRE: TORONTO

**Services** (continued)

- distribution of a monthly newsletter, including reviews, news, new books, bibliographies, products and services descriptions (used as a marketing tool);

- distribution of a "Quotations Book" for the Minister with very limited circulation.

The Information Centre offers other services such as ILL, departmental purchasing of materials, etc. The centre is not directly involved in organizing curriculum development or textbook collections, regional office collections, etc. These functions are assigned to others in the department.

**Automation**

Cataloguing is performed on UTLAS and a microfiche catalogue is available to regional offices and individual departments on request (1985/86 first year). The centre has used UTLAS since 1979/80.

The Information Centre has three IBM PCs. A fourth PC is planned for the near future. The branch plans to set up an IBM-based local area network (LAN). Currently, the centre uses Checkmate software for serials control, although serials will eventually be subject indexed for online inquiry on the LAN.

Long-term plans include online cataloguing in the branch, and use of the LAN for messaging, conferences and online inquiry. The centre will probably stop using UTLAS if cataloguing is brought in-house.

The centre uses standard PC software for bibliographies, spread sheets, etc.

## ONTARIO EDUCATION INFORMATION CENTRE: TORONTO

### Future Role

The role of the Information Centre has changed since 1981 from a repository-style library to an information resource for the department. Librarians are working more and more with the Minister's and Deputy Ministers' offices, and see this trend continuing as the needs of the Ministry and technology change.

The manager sees the role of the Information Centre as a crucial resource to planning and decision making within the Ministry. The Information Centre has achieved a high profile by aggressive marketing services and proving its value. Staff remarked that there is a risk to this high profile in that demands for service from upper levels of the organization often have extremely short turnaround requirements, and failure to meet deadlines would be very visible.

## UNIVERSITY OF ALBERTA, HERBERT T. COUTTS LIBRARY: EDMONTON

**Interviewed:** Ms. Madge MacGowan, Education Area Coordinator

### Corporate Mission

The corporate mission of the H. T. Coutts Library is to provide library and information services to faculty and students of the University of Alberta, with an emphasis on service to the Faculty of Education. The library is perceived to be a library of last resort in the province with respect to education-related resources. Library staff participate in national collection building activities by providing a collection which specializes in prairie region resources. Service to non-campus customers is generally a low priority and is provided on a walk-in basis.

### Staff

Current staff comprise the following:

- 9 full-time professional librarians
- 2 sessional professional librarians
- 31 support staff

Technical processing is provided by University of Alberta's main library.

### Clients

Services are provided mainly to the education faculty, consisting of:

- 4,000 undergraduate students
- 463 graduate students
- 200 faculty members

There are also 23,000 undergraduate students on campus who may use the library.

## UNIVERSITY OF ALBERTA, HERBERT T. COUTTS LIBRARY: EDMONTON

### Collection

The library specializes in historical and research-oriented materials and tries to complement related collections (eg. Alberta Education, Humanities and Social Sciences). Resources include the following:

| | |
|---|---|
| Education collection | 185,000 volumes |
| Curriculum collection | 77,000 volumes |
| Audiovisual | 25,000 volumes |
| Serials | 960 titles |
| Microforms (ERIC, theses, journal back issues) | |

### Services

Current library services include:

- **Reference:**

  . instruction on how to use library
  . referral to other campus libraries
  . quick factual reference questions (1 - 3 minutes)
  . telephone service for quick facts and item locations (maximum of 3 items/call)
  . computer searches. These are limited to 1.0 hour total staff time for non-campus clients. Most non-campus searches are in response to written inquiries. There is a $30.00 fee plus search costs. For faculty and students, there is no limit on search time, and searches are subsidized to a maximum of $45.00.

- **ILL** - available for campus and special borrowers. The latter pay a $50.00 fee and must demonstrate a genuine research need to qualify for service.

## UNIVERSITY OF ALBERTA, HERBERT T. COUTTS LIBRARY: EDMONTON

**Services** (continued)

SDI, journal routing, acquisitions lists, etc. are not part of the library service offering.

**Automation**

Technical services provided by University of Alberta libraries include UTLAS and DOBIS.

The library maintains the Alberta Education Index on SPIRES which is searchable by anyone with a valid University of Alberta computer account.

**Future Role**

The library anticipates no significant change in the foreseeable future.

**Comments**

- **Relationship to Alberta Education** - With respect to collection development, the university library attempts to build a complementary collection to avoid duplication. This is particularly true for older and archival materials. Duplication is undertaken to satisfy high on-campus demand (eg., curriculum collection).

- **Availability of services to Alberta Education staff** - Departmental staff are considered to be external users or special borrowers. All users are treated on a first-come, first-serve basis except faculty members who have greater loan privileges. Ms. MacGowan noted that many materials are often unavailable for borrowing because of semester loans (faculty), the reserve system (for course teaching) and long undergraduate reserve lists. Alberta

## UNIVERSITY OF ALBERTA, HERBERT T. COUTTS LIBRARY: EDMONTON

**Comments** (continued)

Education staff with "special borrower" status are treated as undergraduates.

- **Contracting with Alberta Education to supply special library services** - A similar idea was reviewed several years ago with respect to the Edmonton Public School Board Central Resource Library. Although Ms. MacGowan is not against this in principle, she asserted that her library does not have the physical facilities to house the enlarged staff and collections that would be required. She also felt that even if such a service were physically practical, there would be problems with conflict of interest (Campus versus Department of Education) on a day-to-day basis.

  Problems associated with physically distant locations would also prevent the offering of a first class service. Parenthetically, Ms. MacGowan said that the library service provided by the Alberta Education Library was excellent and she doubted that it could be duplicated by contracting out.